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MARKETS OF EMPIRE

BY

W. H. WILLSON

B.Sc. (Econ.) Hons. London

FORMERLY JOSEPH HUME SCHOLAR IN POLITICAL ECONOMY AT THE UNIVERSITY OF LONDON, UNIVERSITY COLLEGE
CONTRIBUTOR TO THE "ENCYCLOPÆDIA BRITANNICA," HARMSWORTH'S "BUSINESS ENCYCLOPEDIA," ETC.

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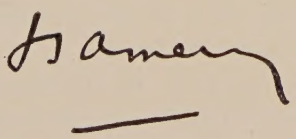
FOREWORD

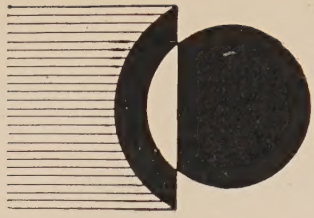
BY THE RT. HON. L. S. AMERY, P.C., M.P.

More and more the general public and the business world alike are coming to the conclusion that the future of our British economic system lies in its linking up with the development and expansion of Empire trade. To establish the British Empire as an economic unit, without prejudice to such economic autonomy within that wider unity as each of its constituent communities find it desirable to maintain, is the greatest constructive task before the statesmen of the Empire to-day.

That task will, as far as they are immediately concerned, be embodied in fiscal changes in their respective countries, and in agreements arrived at by inter-Imperial negotiation or at Imperial Conferences. But these measures in the political domain cannot of themselves create the desired result. They can only create more favourable conditions for its achievement by the business men who will actually open out the avenues of Imperial trade and stimulate Imperial development. And it is the business men, again, who by concentrating on Empire trade can both create a favourable situation for an Empire trade policy, and justify that policy if established.

A book therefore like Mr. Willson's, which gives practical information about the actual situation in the various Empire markets, from the point of view of the different main branches of British industry, is not only of immediate value to the British manufacturer and merchant in search of business, but is in itself also a useful contribution to the initiation and ultimate success of an Empire trade policy. It is in both these capacities that I can commend it both to the business man intent upon the solution of his own immediate problems and to the political student of the general economic situation in the Empire.





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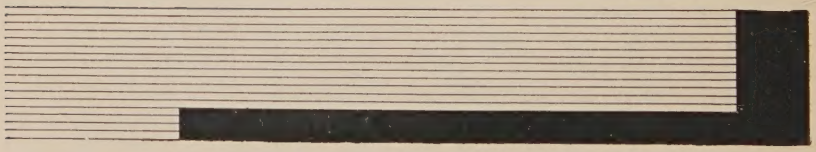

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PREFACE

THE following chapters are based on a series of articles, entitled "Needs of the Empire's Markets," which the author contributed to the Trade and Engineering Supplement of *The Times* from March, 1928, until September, 1929, and he is indebted to the proprietors of *The Times* for permission to arrange for their republication in book form.

The importance of the overseas Empire to British industry and trade cannot be over-estimated. Exports of United Kingdom produce and manufactures exceed £700,000,000 in value per annum: of the total, goods worth more than £300,000,000 are sent to Empire markets. The most promising openings for British goods are to be found in those markets, for total imports of merchandise into the overseas Empire exceed a value of £1,000,000,000 per annum.

This book deals in detail with the opportunities existing in different parts of the Empire for British products, the chapters covering marketing policy, distribution, publicity, present trade, competition, trend in demand, and openings for goods produced in the United Kingdom. Brief statistical details are given at the end of each section, and the advertisements show where marketing service can be obtained.

The author wishes to thank all those, both at home and overseas, who have assisted him with advice and information, and hopes that this book will be of practical help to them in their work in connection with inter-Imperial trade.

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AUSTRALIA

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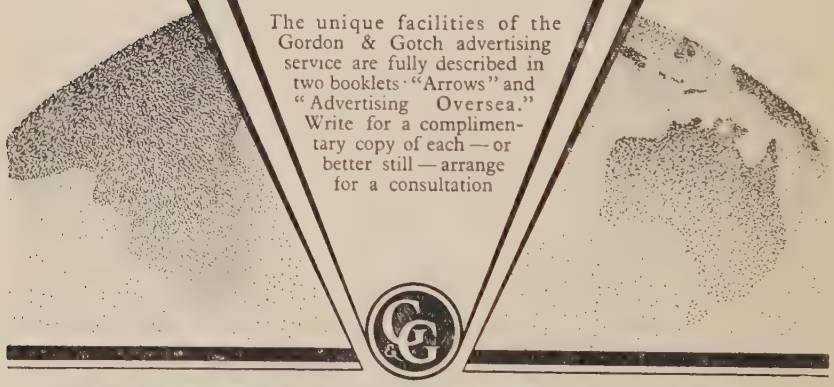

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AUSTRALIA

CHAPTER I

The Australian market has certain well-defined characteristics, and British manufacturers cannot conclude that because their product sells here it will sell in Australia. It is true that the Australian people are almost entirely of British origin, and that consequently their tastes are, to a certain extent, similar to those of the inhabitants of Great Britain, but the requirements of the Australian consumer and of Australian industry are very different from those of Great Britain. These requirements must be carefully studied, and products adapted to the needs of the market. Trade in British goods has, in many instances, been adversely affected by their unsuitability. Competitive products do not sell just because prices are lower than the British, but because the foreign competitor often makes a more detailed study of the market, suits his product to its peculiar needs, and carries out an efficient marketing and advertising campaign.

TEXTILES AND WEARING APPAREL

THE soft goods market is one of the most important to British manufacturers, and one in which British goods hold a commanding position in the import trade. But competition is rapidly increasing, particularly from local producers, and the British manufacturer should take careful stock of developments and the probable trend in demand. The importance of the market can be appreciated from the fact that the value of imports of apparel and textiles exceeds £30,000,000 annually.

The extent of home competition can be gauged from the number of textile and apparel establishments in Australia, which include some 80 cotton, woollen, and tweed mills; 240

knitting and 1,420 clothing factories; 910 dressmaking and millinery works; 1,000 boot and shoe factories; 380 firms producing shirts, ties, scarves, and underclothing, and 90 making hats and caps. This competition is chiefly in millinery, cheap and unbranded underwear, costumes and mantles, corsets, shirts, collars, pyjamas, neckwear, and boots and shoes. The home production of knitted wear, men's hats, and women's silk and artificial silk hosiery is also of importance. The chief markets for British goods are in silk, cotton fabrics, artificial silk hose, linens and laces, good quality men's hats, underwear, mantles and costumes, gloves, shoes, half-hose, knitted wear, and raincoats. United States competition is largely in waterproof fabrics, hosiery, and cotton fabrics.

Preferential Tariff.—The effect of recent tariff amendments is to increase the duty on both British and foreign knitted piece-goods, socks and stockings, leather cloth, fur trimmings, and linoleums; and to decrease the duty on British cotton piece defined, lace in piece, trimmings n.e.i., and gloves, and on British and foreign feathers, undressed. Increased preference has been extended to knitted piece-goods, cotton piece defined, lace in piece, leather cloth, trimmings n.e.i., woven materials, badges, etc., gloves n.e.i., and linoleums from the United Kingdom.

One point of importance to British exporters when considering the question of tariffs is often overlooked: that is—that the high duties are not so great a barrier as they appear, for the Australian manufacturer generally raises his prices to the consumer when he is protected by a tariff, and this tends to increase the demand for the better quality British articles. In certain lines, however, such as woollen piece-goods, woven and embroidered materials in the piece, ribbons and galoons, apparel or attire or other article in part or wholly made up, and socks and stockings, the tariff is almost prohibitive, except in high-quality lines.

Goods in which the material, workmanship, cut, or design is of high quality will always find a market. Excellent open-

ings exist for men's wear, provided the lines are put on the market in a manner likely to bring success. Men's suits and hats, etc., of British origin, are demanded for their quality, design or cut, and will sell if the price is reasonable.

Local Developments.—British manufacturers must appreciate the importance of the growth of the Australian textile industry. The rapid increase in the local production of cheap woollen and worsted goods and made-up goods has resulted in a much smaller market for similar British products. But the market for imported cotton and linen piece-goods was worth more than £7,500,000 in 1928-29, for piece-goods of silk or containing silk nearly £6,500,000, for woollens some £1,500,000, and for apparel and attire approximately £6,000,000.

There are two important consequences of the growth of local industry and the imposition of high tariffs. The first is that, as local manufacturing industry develops, the demand for machinery and plant increases. An excellent and growing market thus exists for textile machinery; the value of yarn-making and textile-making machinery imported in 1928-29 was £464,000. The second consequence is that British manufacturers are finding it to their advantage to erect branch factories in Australia, particularly for the production of made-up goods.

It is of vital importance to British trade that British goods should retain their identity. The practice of shipping to a wholesaler in Australia often means a loss of identity, the line being either sold without a brand or with the brand of the wholesaler. The necessity for branding goods applies particularly to articles of clothing, for it has been found that branded men's wear, etc., has a larger sale than that of similar lines when unbranded, provided, of course, that the quality is there.

CHAPTER II

One outstanding feature of Australian development during recent years has been the growth of secondary industries. All sections of the people are united in the belief that the future prosperity of the Commonwealth depends largely on the ability of the secondary industries to supply all the manufactured goods required, and therefore favour a policy of high protective tariffs, designed to keep out goods from other countries if such goods are or can be manufactured in Australia. It is consequently advisable for British manufacturers interested in the market to keep in close touch with the trend of development in Australian manufacturing industry. The advantage of opening a branch factory in the Dominion should be considered, for local sentiment favours that policy and many British and American firms have already established branches or allied firms in the country.

MACHINERY AND PLANT

The market for machines, machinery, and machine tools has, owing to the active development of Australia's secondary industries during the post-war period, steadily expanded. In 1922-23 imports of machines and machinery were valued at £10,963,874; in 1927-28 the value was more than £16,000,000, and in 1928-29 nearly £15,000,000. In 1918 the value of plant and machinery used in Australian factories was £50,792,305; by 1926 this value had reached a total exceeding £112,000,000. Since 1926 progress has been even more marked, largely owing to the establishment by British and foreign firms of factories in Australia.

This development is mainly the result of the tariff policy of the Commonwealth Government, which has been designed

to encourage the growth of local manufacture, and the establishment in Australia of branches of oversea firms. But Australian industry, despite its recent progress, is still in the early stages of development. A strong demand for imported machinery and allied products will exist for a considerable period, and there will always be a market for high-quality British machinery, but British manufacturers must keep in very close touch with the development of Australian secondary industries, and particularly with the progress of the home machinery industry.

The import tariff on machines and machinery is designed to assist the local manufacturer. Where the article is not made in the country it is generally admitted free of duty, but the Customs Department has wide powers regarding admission if it is considered that the article can be made locally. The preferential tariff treatment granted to products of British origin is of very considerable value to the British exporter.

Australian Industries.—The chief Australian industries are those engaged in the production of textiles and metal goods. Others of importance are electrical equipment, cycles and motors, agricultural machinery and implements, linoleum, artificial leather, furniture and cabinet-making, boots and shoes, hardware, tiles, gramophone records, tyres, and soap and candles. In recent years the industries connected with food and drink have made good progress. Careful attention is being given to the iron and steel industry, one development being the formation of a company with a nominal capital of £5,000,000 to establish extensive iron and steel works at Port Kembla in New South Wales.

The progress of these industries presents a steady demand for machinery and equipment. This demand cannot be satisfied locally, and consequently there are always openings for British products. The variety of machinery required is well illustrated by public tenders invited in 1928 and 1929: and inquiries made for wood moulding, horizontal mortising, and universal testing machines; agricultural machinery; machinery for making paper tubes; boring and testing mills, together with

all necessary equipment; pumping plant; a high-pressure blacksmith's fan, etc. A good market exists for textile machinery and equipment, particularly in New South Wales, and it is anticipated that demand will increase rapidly in the near future. Owing to the expansion of the hosiery industry, knitting machines are in request; this trade is largely in American hands, but it provides British manufacturers with an excellent opportunity for increased sales. Weaving, spinning and twisting, and finishing machines, mules, etc., find a ready sale. The demand for wool-scouring and washing machines is largely satisfied by local manufacturers.

Electrical and Power Machinery.—The development of hydro-electric and other power schemes has resulted in a growing demand for electrical machinery. Metal-working machinery such as lathes, punching presses, drilling, grinding and milling machines, etc., sell well. Power machinery is in constant demand, particularly boilers and boiler-house plant, gas, steam and spirit engines, locomotives, and tractors. Schemes in being and in hand for the extension of railway facilities provide good openings for locomotives and railway equipment. The demand for farm and other tractors is steadily increasing, and presents excellent opportunities for British products. Office machinery such as typewriters, adding and calculating machines, etc., printing machines and presses, air and gas compressors, mining machinery, hand and other pumps, excavating machinery, roller and ball bearings, and wringing and sewing machines are also in demand.

In many of these lines competition from American firms is very strong. But closer attention to market requirements would result in increased sales of British goods. This also applies to the market for agricultural machinery and implements, dairy machinery, sheep-shearing machinery, and machine tools. The demand for agricultural machinery and implements is largely satisfied by local manufacturers, but the import trade is still of importance. Machine tools such as pneumatic mining drills, etc., have a growing market. In order to obtain the market,, however, British manufacturers

must be prepared to supply the particular type of tool required. Agents should be instructed to note any new type of tool on the market, and at once send samples to their principals in order that similar tools can be made and placed on the Australian market.

CHAPTER III

Freight and transport problems are of great importance in the marketing of British products in Australia. Freight charges between the town of manufacture in the United Kingdom and the centre of distribution in Australia need careful attention, and co-operative action can lessen the charges per unit of production.

In regard to distribution in Australia, a glance at the map will enable an appreciation to be obtained of the distances between the chief centres. The distribution of population must also be considered, for out of a total population estimated at 6,356,770 *on March* 31, 1929, *more than* 2,100,000 *were concentrated in the two cities of Sydney and Melbourne, and nearly* 900,000 *in the other four capital cities.*

MOTOR VEHICLES

The demand for motor vehicles is clearly shown by registration figures. On June 30, 1929, the total number of motor vehicles registered approximated 620,000—one vehicle for every ten inhabitants of the Commonwealth. After the war, registrations of new vehicles increased rapidly until 1927-28, when various factors resulted in a distinct decline. In 1928, registrations of new cars and trucks fell, as compared with the preceding year, in each State of the Commonwealth except West Australia. The year 1929, however, showed a general improvement, particularly in motor-car registrations.

The disturbed economic condition of Australia in 1927-28 was clearly reflected in the values of motor vehicles and parts imported from overseas. Imports of motor-car bodies were valued at some £300,000 less than in the preceding year, while imports of motor-car chassis fell by more than £5,000,000. A significant—and disturbing—feature of the Customs returns was that imports from the United Kingdom

declined to a much greater extent than those from the United States, the chief competitor in the market.

Improved Conditions.—During 1928-29, however, general conditions became more normal, and the demand for motor vehicles responded to the improvement. Total imports of motor vehicles and parts remained well below the 1926-27 level, but, as compared with 1927-28, imports of motor-car bodies increased in value from £1,116,419 to £1,461,895, and of chassis from £7,140,368 to £9,204,871.

Great opportunities exist in Australia for the British manufacturer who is producing a car suited to the conditions of the market, and who carries out an efficient marketing campaign. The second of these conditions is of vital importance. A product does not sell itself. Selling agents must be assured of continuity in their relationship with the principal, must be consulted in such matters as the fixing of retail prices, and must be supported by well-directed publicity.

American Methods.—During the post-war period, American exporters obtained control of the Australian market. This control was not solely the result of the suitability of the American car to conditions in Australia. The American exporter educated the public by extensive and well-directed publicity, and kept his product prominently before the consumer. This policy resulted in a taste for the American type of car, a taste that the English manufacturer must overcome.

The common method in publicity has been to have both principal and distributing agents contributing *pro rata* to the advertising fund. If it was decided that the sum of, say, £5,000, was to be spent on advertising, the principal contributed £2,500 and the other £2,500 was contributed by the distributors in each State in proportion to the field to be covered. This method of publicity resulted in the enthusiastic support of the distributors and ensured a co-operative spirit in marketing—a vital factor in every selling campaign.

The British Product.—Public sentiment favours the car that is "Made in England," and if the British manufacturer

will give the Australian buyer the car he wants, educate him by publicity to appreciate that the British car will meet his requirements, and obtain the fullest measure of co-operation from the distributors, then the United Kingdom should secure the greater part of the trade. The tariff preference granted to imports of British origin is of great assistance to the British manufacturer, particularly to the exporter of chassis.

The demand has mainly been for the strongly built American type of car, of between 20 and 30 horse-power, selling at a maximum of £500. The English light six-cylinder car is, however, making rapid headway, particularly in the more thickly populated areas. Given efficient marketing, its future prospects are very bright.

Commercial Vehicles.—The demand for commercial vehicles of all kinds has shown a great expansion during recent years. Municipal authorities are constantly extending their road services, and close touch should be maintained with developments in the municipal sphere. Federal and State authorities are also large purchasers of lorries, trucks, etc., and it is very satisfactory to find that the general tendency is towards the purchase of British products in preference to foreign.

Road surfaces are very good in and around the chief cities. Outside these areas the roads have not had a good reputation, but they are steadily being improved. Attention is being paid to the construction of arterial roads between the principal centres, and a satisfactory rate of progress maintained.

The rapid growth in the use of mechanical transport presents valuable openings for British manufacturers of lorries and trucks. The British product enjoys an excellent reputation, particularly for heavy service, and there is a bright future for the six-wheeled vehicle. Road transport is a necessity in Australia. Road services are linking up outlying centres with railhead, and are rapidly being extended. The services between the chief towns are now formidable competitors to the railways.

Motor-Cycles.—A good market exists for motor-cycles, British products having the greater part of the trade. Total imports in 1928-29 were valued at £655,697, as compared with £484,509 in 1927-28 and £688,014 in 1926-27. The British share of the import trade in 1927-28 was valued at £355,432 and in 1926-27 at £464,968. Competition is almost entirely from the heavier cycle of American origin.

CHAPTER IV

During the post-war period the demand for manufactured goods has steadily increased throughout Australia. Local production, assisted by tariff protection, has shown a very considerable expansion, but the market for imported manufactured products has also developed. A vital factor in the marketing of imported lines is efficient representation in Australia. Great care should be exercised in choosing representatives. Demand varies in different States, and it may be found advisable to appoint a separate representative in the principal centre in each State.

ELECTRICAL EQUIPMENT

The use of electric power in transport, industry, and the home has steadily expanded. Hydro-electric schemes and other sources of electric power have been developed, and it is estimated that schemes in hand or about to be developed in the near future will call for equipment of a value of more than £3,000,000. In New South Wales the Barren Jack (Burrinjuck) hydro-electric scheme is being extended, and a second station designed for an installed generator and turbine capacity of 20,000 kw.; the Lithgow power station is being extended and two additional turbo-alternators of 5,000 kw. each installed, together with the corresponding boilers, etc. In Queensland a hydro-electric scheme at the Barron Falls is proposed. In Victoria, Tasmania, and other States transmission lines are being extended and electric power supplied to new areas. Tasmania, in particular, presents a very fertile field for the development of water-power resources.

The development of electric-power resources is shown by the growth of the number of electric light and power works

and in the production of electric current. One result of this growth is the steady increase in the total area supplied with electric current, and a consequent increase in the demand for household electric appliances. The number of wired homes has steadily grown, the Australian people having realized the value of electric power as an aid to the solution of domestic labour problems.

Household Devices.—A growing demand consequently exists for household electrical devices such as irons, vacuum cleaners, fans, clothes-washers, radiators, toasters, sewing machines, ironing machines, dish-washers, ranges, kettles, grills, stoves, ovenettes, portable lamps, and bells. Home light and power sets are in demand in the outlying areas which are not supplied with current from generating stations. Keen competition is experienced in all these lines from United States products and also from the products of Australian manufacturers.

Transport developments are of considerable interest to British manufacturers. The electrification of suburban railway systems is steadily proceeding, and as the traffic on the main country lines develops it is intended to convert to electric traction all busy sections in the neighbourhood of a cheap power supply. The increased use of motor transport both for pleasure and commercial purposes has resulted in the establishment of a greater number of motor garages, and consequently in an extended demand for electric garage equipment.

The growing use of electricity in industry has increased the demand for electric machines of all kinds. A good market exists for electric cranes, factory lighting equipment, and machinery devices such as soldering irons and ovens. Smaller establishments, such as bakers' and blacksmiths', show a steady demand for electric bakers' ovens and forge blowers. Other lines in demand include electric lifts, both for passengers and goods; electric measuring and recording instruments, and regulating, starting, and controlling apparatus.

Tariff Amendments.—The Customs tariff amendments in 1926 imposed heavy increases of import duties on certain lines. Imports of British origin receive substantial preferential tariff treatment. The Customs tariff amendments of 1927 increased the duty on both British and foreign storage batteries for motor-cars and on foreign telephones; the duty on both British and foreign electric fans was decreased; increased preference was granted to goods of British origin in each of these items. Electric fans of British origin are now admitted free of duty, the intermediate tariff being 15 per cent. *ad valorem* and the general tariff 25 per cent. *ad valorem*. Other tariff changes were in electric household floor polishers, ironing machines, human hair dryers, household dish-washing machines, and telephone switchboards, distributing boards, and appliances.

All these articles are now admitted free of duty under the British preferential tariff; a duty of 15 per cent. *ad valorem* is imposed under the intermediate tariff, and 25 per cent. *ad valorem* (except on telephones, etc., which pay 20 per cent.) under the general tariff.

CHAPTER V

The vital factor of a successful sales campaign in Australia is a thorough study of the market before the campaign is inaugurated. A personal visit or a careful report from a man on the spot is essential. It may be argued that Australia is a six weeks' journey from Great Britain, and therefore that a personal tour would take a longer period than a busy manufacturer can spare away from his business. The alternative is to send out a trustworthy representative. The expense of such a trip need not be borne by one firm only; a number of firms engaged in the production of similar lines could share the cost and each could receive a copy of the report. Co-operative investigation and advertising are necessary to success in the Australian market.

HARDWARE AND CUTLERY

The tariff preference accorded to products of British origin is of the greatest value. In 1927 an increased measure of preference was granted on barbed wire, fencing wire of 8 to 14 gauges, wire of 15 and finer gauges, wire for the manufacture of barbed wire, wire netting, cutlery, kettles and cooking utensils of iron (excluding stoves), aluminium and enamelled ware (excluding stoves and baths), mortice lock sets, and domestic kitchen ware such as asbestos mats, metal soap savers, metal soap racks, metal stove toasters, metal tea, coffee, and gravy strainers, and potato mashers.

British products have a firm hold on the market in the majority of lines; American and German goods are the strongest foreign competitors. The need is mainly for quality goods, suitability of design and finish being of primary importance; the demand for imported cheap lines is very limited. Branded goods are in chief request, and in this connection it is

satisfactory to note that advertisements of British lines give prominence to the name of the brand and the name and address of the manufacturer. There is a constant opening for tools of all kinds, including saws, saw blades for hand tools, hammers, files, rasps, axes, joiners' edge tools, etc.

Domestic Appliances.—An excellent market exists for domestic appliances of all kinds. Cast iron, aluminium and enamelled kettles and cooking utensils are largely obtained from the United Kingdom, as also are general cooking and heating appliances. The market for quality aluminium and enamelled ware is of considerable value. Local production is steadily increasing, and competition from Canada, the United States, Germany, etc., is very keen. Canadian lines covering every class of aluminium cooking and household utensils, Swiss decorative aluminium ware, and German novelty lines in aluminium ware, and wooden household appliances are in evidence. In iron, tin, and enamelled hollow-ware, local competition is of importance. There is a good trade in mangles, clothes wringers, and household clothes-washing machines; it is largely in British hands, but American competition is very strong.

Wire.—Wire products are in demand. The United Kingdom has the greater part of the trade in wire of No. 16 or finer gauge, wire for use in the manufacture of barbed wire or wire netting, wire netting and mesh, steel nail wire, wire nails and staples, and other wire, n.e.i. Barbed wire presents good openings for British manufacturers, but at present it is mainly obtained from the United States.

The market for lamps and lampware is keenly competitive. Total imports in 1928-29 were valued at £564,000. American firms have the biggest share of the market, and Canadian and German products have a good sale, but British lines could obtain a much larger portion. Miners' safety lamps are obtained from the United Kingdom. Openings exist in the market for glass parts of lamps and lanterns, which at present come mainly from the United States, and for oil and spirit heating lamps, chiefly supplied by the United States and

Sweden. Incandescent mantles come from the United Kingdom and the United States. Gas meters and fire extinguishers are mainly from the United Kingdom.

Paints and Varnishes.—The great activity in the building trade throughout the Commonwealth, and particularly in Sydney and Melbourne, and the steady growth of the population of the country have resulted in a growing market for builders' hardware, paints, and varnishes. Demand is mainly for quality lines.

Imports of paints and colours in 1928-29 were valued at £713,000, and of varnishes, stains, lacquers, etc., at £71,000. This trade has shown a considerable increase during recent years, and requires the closest attention from British manufacturers. Before the war it was largely in British hands, but now the market is chiefly supplied by local products or by imports from the United States. British firms have a good share of the business in imported varnish and oil stains, artists' colours, dry colours, white lead, and putty; but America controls the market for enamels, enamel paints, glosses, liquid removers of paint and varnishes, water paints and distempers in powder form, etc. The trade is principally in prepared paints, varnishes, and enamels, and presents excellent openings for British lines.

Cutlery.—Cutlery and plated ware is mainly supplied by British firms. Imports in 1927-28 were valued at £820,139. An excellent demand exists for table cutlery of good quality, including butter, fish, and fruit knives, carver sets, cheese servers, jam, butter, and sugar spoons, etc.

CHAPTER VI

The sales value of a manufacturer's brand cannot be overestimated. Lines should be sold "on the brand," and that brand must be brought to the notice of the consumer by means of well-directed publicity. In such publicity it is not advisable to emphasise the slogan "Buy British." The words "Made in England" have a better appeal. Each advertisement should include the name of the manufacturer, and the name and address of the local agent.

GROCERIES AND CONFECTIONERY

The market for groceries and confectionery is not an easy one for importers owing to the very keen and well developed local competition, but groceries which are equal to the local product in price and quality will find a market if properly packed, distributed, and advertised. Imported special lines are good sellers, the market being largely for quality goods. Cheap goods will not find a sale unless they are branded and the name of the brand given wide publicity in order to make it familiar to the public. The support of the retailer is vital to success, and to get him to stock the line some extra inducement, such as a good publicity campaign, is essential.

The British manufacturer has a great advantage over his foreign competitors in the fact that a high percentage of the inhabitants are of British birth, and prefer branded food products which were familiar at home. Given the publicity necessary, and close attention to popular taste, good sales will result. In general, local products are not packed so well as those imported from the United Kingdom. The tendency in certain lines, however, is to develop packing in Australia rather than to import packed goods. The use to which con-

tainers can be put after the contents have been consumed must be carefully studied, and it is a valuable selling point in the areas outside the large towns if the container can be used for some purpose connected with the daily life of the buyer.

The growth of flat life, and the tendency in the large towns towards snack meals, are responsible for a steady increase in the demand for prepared and tinned foods, and there has been great increase in local production. The home confectionery market is largely in the hands of local manufacturers, and British firms interested in its possibilities should consider the advisability of establishing a branch factory in the Dominion.

Pickles and Sauces.—Imports of pickles and sauces in 1927-28 were valued at £85,542, and in 1928-29 at £96,112. Better quality imported lines have a good market. Mixed pickles are generally preferred, but openings also exist for sweet pickles and pickled onions. Imported bottled vinegar has only a small sale. The demand for mustard is chiefly for the dry English variety, packed in tins, but novelty lines will find a sale; imports in 1928-29 were valued at £89,565. An increasing demand is experienced for olives and mayonnaise dressing, due partly to tastes developed by Australians when travelling overseas.

Jams and Fruits.—An excellent market exists for jams, but it is mainly in the hands of local manufacturers. Imported goods should preferably be packed in tins, sizes varying from ½ lb. to 2 lb., 5 lb., and 10 lb. Very good openings are to be found for high quality whole fruit jam conserves and for good quality marmalades, as the local manufacturers are not yet able to compete effectively in these lines. Conserves preferred are strawberry, gooseberry, and similar lines, either in jars or tins. Bottled, mixed, and prepared fruits find a ready sale at present; local competition will certainly increase in the future, and the best policy for the British producer to follow is to make a market for a branded line and then establish a branch factory in Australia. Fruit juices are in demand. A

market exists for bottled cider, and a good lemonade powder will find a sale.

The demand for imported cocoa and coffee in bulk is not large. Cocoa and coffee in tins have a sale, but openings are not promising. A market exists for good quality packet Ceylon tea; the Australian prefers the Ceylon variety, and with efficient distribution and publicity such a line should be successful. An expanding market is that for coffee extracts and essences. Packed cream cheese and Gruyère cheese find a ready sale; a product which would sell well is a flavoured luncheon cheese packed in tins.

The market for biscuits is mainly catered for by local producers, but there is a demand for imported special lines, both sweetened and dry unsweetened. Jelly crystals have a good sale, and there are openings for well-known lines of custard powder and baking powder.

Fish and Meat.—Imports of foodstuffs of animal origin are of considerable value, the total in 1928-29 being £2,369,324. British importers have a good share of the trade in imported fish and in meat extracts and powders. Imports of fish preserved in tins were valued at £1,265,529 in 1927-28, while imports of fresh, smoked, potted, and concentrated fish increased from £392,222 in 1926-27 to £430,154 in 1928-29. Excellent openings exist for tinned and smoked fish, particularly for kippers, sardines, and herrings in tomato sauce.

The market for kippers is comparatively new and is growing rapidly; fish packed in attractive containers have a very good chance of obtaining a successful market. Fish and meat pastes are in good demand, imported meat pastes being preferred to the local product. Tinned sausages have a ready sale, and there is a call for sausage casings. Openings exist for canned shellfish, canned poultry and game. Tinned asparagus is in demand, but the market for other tinned vegetables is of little value.

Chocolate and Confectionery.—Imported chocolates and confectionery find very keen competition from local products.

Imports of chocolate confectionery in 1928-29 were valued at £29,265, compared with £31,747 in the preceding year. Other confectionery showed an increase from £78,787 in 1925-26 to £108,269 in 1928-29. Special lines of chocolate confectionery, such as liqueur chocolates, will find a sale, but the openings are not large. Decorations for confectionery and cakes are wanted, and there are good possibilities for sugared sweets, such as cherries for cocktails. Wrapped toffees of varying flavours have a market, but the public must be educated by good publicity to demand the imported lines.

Imports of caramels, caramel paste and butter and cocoa butter in 1928-29 were valued at £192,344, and of cocoa and chocolate at £304,466. Demand for these lines fluctuates considerably from year to year, but the market is well worthy of consideration.

CHAPTER VII

It is but a truism to state that no marketing campaign is complete without a well-organized advertising campaign. Yet many British manufacturers appear content, after they have appointed a local agent or representative in an oversea market and sent him goods for distribution, simply to have a short campaign in the leading daily papers. Local judgment should govern the choice of position and suitable days for insertion, for local news and local conditions tend to give better value to advertising in certain papers on certain days. Such points cannot be decided by a person thousands of miles away.

The co-operation of the trade must be obtained if the campaign is to start well and be brought to a successful conclusion. An appeal in the form of a booklet containing reproductions of Press advertisements or details of a special campaign carried out can be used with good results.

POTTERY, GLASS AND GLASSWARE

In regard to pottery, glass, and glassware, the preferential tariff varies from 10 per cent. *ad valorem* on table glass, bent and bevelled glass, etc., to 25 per cent. *ad valorem* on china, porcelain, and earthenware. Local competition is almost entirely in the cheaper lines. The number of factories is steadily increasing, there being more than 410 factories producing bricks, tiles, pottery, and earthenware, and 87 making ornamental glass, glass bottles, and other glassware.

The market for chinaware and earthenware is, in general, very similar to that in Great Britain. The trade is largely in British hands, but competition from Japan has shown considerable growth, and the steady increase in imports from Germany is a disturbing factor. Local competition is restricted to cheap china and earthenware.

The growing value of the market is clearly shown by the values of imports. In 1928-29 crockery and other household ware of china, porcelain, and parianware to the value of £750,106 was imported, compared with a value of £748,167 in the preceding year. The British share of the trade was quite large and could be increased. Imports of other earthenware, cements, china, and stoneware were valued at £429,206 in 1928-29, and of Portland cement at £69,634.

Quality Lines.—Quality British lines with well-known branded names always have a sale, both for general use and for decorative purposes, such as wall ornaments. The market for good-class china and pottery is in British hands. Public departments buy British products in preference to foreign. Good quality decorative bone china is in demand for better-class household use and for hotels and restaurants. Cheaper lines of china and earthenware have a good sale, both in the towns and in the up-country districts.

A market which presents good openings for British products is that for electrical earthenware, such as insulators, etc.; at present American products have more than 50 per cent. of the trade. There is a strong demand for glazed and enamelled fireclay manufactures, and roasting dishes, assay furnaces, crucibles, sanitary and lavatory basins, kitchen sinks, and other china, porcelain, parian, and earthenware are in growing demand. These goods are almost entirely supplied by British firms. Practically all the highly finished sanitary-ware required is imported from the United Kingdom; cheaper lines are largely manufactured in Australia.

Tiles.—Flooring, mosaic, and glazed tiles are wanted to an increasing extent. Home competition is mainly confined to rough hearth tiles. Very careful attention is necessary if British manufacturers are to retain their trade in flooring and mosaic tiles. In 1926-27 the total imports rose compared with the preceding year, but the value of imports from the United Kingdom fell, while in the case of imports from the United States it increased. Competition from Czechoslovakia and

Italy is also extending. It is satisfactory, however, to note that the British share has since increased.

Imports of glazed wall and hearth tiles showed a large increase in 1926-27 compared with 1925-26, but in 1927-28 they declined. More than 75 per cent. of the orders come to the United Kingdom, but imports from Germany, Belgium, and the United States are of growing importance. The trade in roofing and other tiles, while not of great value, deserves attention, for imports from France have obtained a leading place. American competition is very keen in fire and glazed bricks.

Glass and Glassware.—The demand for glass and glassware shows, on the whole, a steady increase. The United Kingdom is the chief source of supply, but there is strong competition from Belgium, Germany, and Czechoslovakia, while the local glass industry is of growing importance. The lower prices of Continental products are enabling them to obtain an increasing share of the trade. It is satisfactory to note that in the market for polished and patent glass the United Kingdom is now the principal supplier, a position formerly held by Belgium. Imports in this class showed a large increase in 1926-27; the British share was valued at £243,936 out of a total of £467,078. In 1927-28 total imports decreased in value to £343,532, but the United Kingdom retained her hold on the trade, her imports being valued at £192,717.

British high-class cut glass, tableware, and bevelled glass is wanted. There is more competition from Czechoslovakia in ornamental and fancy glassware, while American and Belgian competition is very keen in bent, bevelled glass framed with metal. The demand for glassware for cooking utensils and table and ornamental purposes is very good, imports rising from a value of £400,272 in 1926-27 to £444,684 in 1927-28; the British share of this trade showed a substantial increase, while imports from the United States fell. Good openings exist in these lines, but keen competition is

met with from Czechoslovakia, Japan, Germany, Belgium, and Sweden.

There is a growing market for bottles, flasks, jars, vials, and tubes of glass; glass caps for fruit jars, etc., are also in request. Competition is mainly from America and Japan. Lenses, and locket, brooch and watch glasses have an expanding sale. Total imports of glass and glassware were valued at £1,221,313 in 1928-29 compared with £1,219,762 in the preceding year.

CHAPTER VIII

British manufacturers interested in the Australian market should pay careful attention to import duties. Competition in many lines is largely from cheap foreign goods, and the tariff preference granted to imports of British origin is of great value, often enabling the handicap of lower foreign costs of production to be overcome. Recent amendments to the tariff have maintained the principle of preference to imports of British origin, and in certain cases have increased that preference.

PAPER AND STATIONERY

THE market for paper, stationery, and paper manufactures is of very considerable value to British firms. A factor of the greatest importance is the preferential tariff treatment given to products of British origin. The preference on newsprint has been extended to Canadian firms, with the result that the Canadian share of that trade has shown a considerable increase since 1924-25. Imports of printing paper were valued at £3,046,868 in 1928-29. British firms have a strong hold on the trade, and the reputation of their products, combined with efficient selling organizations, should enable them to maintain their position.

Paper.—Total imports of paper were valued at £4,984,260 in 1928-29. A strong and growing demand exists for absorbent paper for copying machines; duplicating, cartridge, cover, blotting, filter, and gummed papers; and for stencil carbon and similarly prepared copying papers. British firms have the greater part of this trade, but competition from the United States is increasing in stencil carbon and similar papers. Tissue and tissue cap paper is mainly obtained from Sweden, but here again the American share is growing. Writing and typewriting paper is principally from the United Kingdom;

competition is chiefly from Norway, but Sweden, Finland, Germany, Canada, and the United States of America have a share of the trade.

Wrapping papers of all kinds are in strong demand, the trade presenting good business openings for British lines. At present Great Britain's share of imports, which totalled £365,896 in 1928-29, is very small. Sweden occupies the leading position in every line. A fair proportion of the trade in kraft paper is held by Canadian exporters, while Norwegian and American firms satisfy a considerable part of the general demand. Roofing and sheathing felt and paper have a ready sale, supplies coming from British and American producers.

Boards.—Millboards, strawboards, cardboard, and other boards have an expanding market, imports increasing in value from £264,025 in 1926-27 to £356,677 in 1928-29. Boards for commercial printing and art work are in request. British exporters will find a good opening for their products in the majority of lines, particularly Bristol boards, cardboard, pulp boards, and coated boards. Strawboards are obtained almost entirely from the Netherlands. Other competition is mainly from Sweden, Germany, and the United States. British manufacturers have a good share of the business in electrical insulating paper and boards, but competition from the United States has greatly increased.

Manufactured Stationery.—An excellent market exists for manufactured stationery, particularly for better quality lines. In this trade a good selling organization is of vital importance. Representatives must be able to get around quickly and at the proper time of the year. Christmas trade, for example, is done during the preceding January and February. Samples must be sent out in good time, especially samples of notepaper, envelopes, account and other books, etc., which are sold in the "fancy goods" shops.

In the cheaper lines of manufactured stationery strong competition is experienced from local manufacturers; the

better quality goods have a growing sale, and British firms prepared to supply them will find their efforts well rewarded.

Boxed stationery has an expanding market; demand for quality lines is of considerable value. Certain local firms manufacture these, but British products are in request. Openings exist for firms prepared to export the material in bulk, to be made up in Australia by local firms. Envelopes for business and private use have a ready sale. Cartons are widely used for cakes, proprietary medicines, etc. A fair local production exists, and British firms interested should ascertain local prices before entering the market. In general it will not pay to export in small quantities. Better quality cartons, requiring a high standard of printing, have little local competition.

The trade in manufactured stationery is chiefly in British hands, a satisfactory fact in view of the increasing market. Albums, cards, and booklets; account, cheque, copy, memorandum, and other books; playing cards; calendars, almanacs, and diaries are all obtained mainly from the United Kingdom. There is only a small local production of art Christmas cards and calendars, and the preferential tariff is of great assistance to British products in competition with American lines.

Printed Books, etc.—Imports of printed books, including novel, periodicals, newspapers, and music, are valued at more than £1,300,000 per annum. The trade is almost entirely in British hands. Good representation and adequate publicity are essential to success. Fashion plates and books have a ready sale; American firms are very active in this section of the trade, supplying some three-quarters of the total imports. Maps and charts are chiefly from the United Kingdom.

Wallpapers.—The demand for imported paperhangings and wallpapers shows a steady expansion, imports having increased from a value of £114,480 in 1925-26 to £129,795 in 1927-28 and £138,232 in 1928-29. The market has good possibilities for United Kingdom manufactures: British designs of a quiet type are generally preferred.

CHAPTER IX

Efficient distribution is of the greatest importance. In trying out a line it is advisable to work one zone, such as the Sydney area, first. It must be remembered that the whole of Australia cannot be worked effectively from one centre only, as there are at least six well-defined market zones. It is not advisable to appoint an agent carrying many different products, and to market properly a sole representative is generally necessary. This agent could have his office in, say, Sydney, and branch offices or wholesalers in each of the other principal centres.

WIRELESS APPARATUS

The Australian market for wireless apparatus has shown a rapid growth since 1921, when broadcasting first began on a large scale. There are now twenty-two broadcasting stations in the Commonwealth, ten of which are in New South Wales. The boom period in the wireless market has passed, and a period of steady development has arrived, recent improvements in equipment being fully reflected in general demand.

The growing popularity of radio is clearly shown by the increase in licence holders. During 1925-26 approximately 125,000 licences were issued. The number increased to 214,000 in 1926-27, and by December 31, 1928, had reached nearly 290,000.

Rural Demand.—A noteworthy development has been the remarkable increase in demand from outside the urban areas. The farmer no longer regards wireless as a new fangled invention, for he is convinced of the value and utility of the service of news, market reports, weather intelligence, etc., provided by the broadcasting stations. In New South Wales, in 1924, out of total licences numbering 34,000, some 16 per cent. were

held by inhabitants of the country districts. By the end of 1928, out of a total of nearly 80,000, 33 per cent. were held by country listeners, representing approximately 10 per cent. of the total population of the rural areas. This progress is largely due to the provision of selective, reliable, and easily handled receiving sets.

Local production of complete sets is growing, but it will be some time before a competitive high-quality set can be made in Australia. Openings for the imported product remain large, and should show considerable expansion during the next few years. Receiving sets and wireless valves were not separately distinguished in import trade returns until 1926-27. In that year imports of wireless sets were valued at £422,715, and valves for wireless telegraphy or telephony at £223,645. In 1927-28, imports of sets, including loud speakers and wireless parts not otherwise indicated in returns, were valued at £376,056. Imports of valves were worth £178,688.

The import trade in receiving sets is divided between the United States of America and the United Kingdom, but American products have the larger share. In 1927-28 goods from the United States were valued at £208,012, and from the United Kingdom at £118,584. British firms have a stronger hold on the market for wireless valves, imports from the United Kingdom in 1927-28 being valued at £64,199, compared with £53,067 from the United States and £58,766 from the Netherlands.

The outstanding feature of the wireless trade has been the rapid increase of American firms' sales. During 1923 total imports from that country were valued at only £40,000, but by 1928 the figure was £350,000.

Tariff Preference.—Apart from the natural sentiment in favour of British products, which is of considerable selling value, British manufacturers receive great assistance from preferential tariff rates. Assembled receiving sets from the United Kingdom are subject to a duty of 35 per cent. *ad valorem,* while foreign imports pay 55 per cent. *ad valorem.* British wireless valves and loud speakers are admitted free

of duty, the tariff on foreign imports being 15 per cent. *ad valorem* and 10 per cent. *ad valorem* respectively.

The predominance of American products is largely due to the fact that the equipment needed for the reception of wireless in Australia is similar to that in general use in the United States. Broadcasting in Australia has now reached the stage when many listeners are not satisfied only with reception from local stations, but want to be able to pick up other Australian stations, New Zealand stations, and even America and England. Demand for the super-selective set capable of receiving short-wave stations transmitting on 100 metres or below, and also up to wave-lengths of 2,000 metres, is consequently of growing importance.

Ultra-Selectivity.—Ultra-selectivity is the chief feature of the super-heterodyne set (a seven or eight valve set capable of picking up almost any station), for which demand is expanding; no aerial or earth is normally required. The neutralized set, or one using the new screen grid valves, is also in good request. The two or three valve set is commonly used for local reception, and is very popular with the urban populations and with small farmers who wish to pick up the local broadcasting station only. The use of such sets is consequently confined to the neighbourhood of the chief broadcasting stations. Portable and transportable sets are in increasing favour, particularly for holiday and camping use.

British wireless valves have an excellent market, which is well worth careful cultivation. Loud speakers are in good demand, but it is imperative that careful investigation should be made into the types preferred. The cabinet type of imported loud speaker has only a small opening on the market. A separate import duty of 35 per cent. *ad valorem* is levied on British, and 50 per cent. *ad valorem* on foreign, cabinets, apart from the rate on the mechanism of the loud speaker.

The actual marketing of the product is of vital importance. Careful investigation must be made into methods of distribution, for goods new to the market will not find it easy to secure

an efficient selling organization. Good showrooms in the chief towns are of great value, and it must be appreciated that every selling effort must be supported by a good Press advertising campaign. The 1929 and further amendments to the tariff on wireless parts should be carefully studied. Details can be obtained from the office of the High Commissioner for Australia, at Australia House, Aldwych, London, W.C. 2.

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AUSTRALIA

MARKET DATA

Area and Population.—The Commonwealth of Australia has an area of 2,974,581 square miles. It includes the following states and territories: New South Wales, Victoria, Queensland, South Australia, West Australia, Tasmania, Northern Territory, and the Federal Capital Territory. The areas and populations are as follows:

States and Territories.	*Area, Square Miles.*	*Population (Exclusive of Full-blood Australian Aboriginals).*					
		Census, April 4, 1921.			*Estimated, March 31, 1929.*		
		Males.	*Females.*	*Persons.*	*Males.*	*Females.*	*Persons.*
N.S.W. ..	309,432	1,071,501	1,028,870	2,100,371	1,252,477	1,204,650	2,457,127
Victoria ..	87,884	754,724	776,556	1,531,280	877,170	889,208	1,766,378
Q'land ..	670,500	398,969	357,003	755,972	486,771	432,480	919,251
S. Aust. ..	380,070	248,267	246,893	495,160	299,603	280,062	579,665
W. Aust.	975,920	177,278	155,454	332,732	221,769	186,717	408,486
Tasmania	26,215	107,743	106,037	213,780	105,909	107,572	213,481
N. Ter. ..	523,620	2,821	1,046	3,867	2,767	1,257	4,024
Fed. Cap. Territory	940	1,567	1,005	2,572	4,739	3,619	8,358
Total ..	2,974,581	2,762,870	2,672,864	5,435,734	3,251,205	3,105,565	6,356,770

The capital cities, and their populations (estimated) on December 31, 1928, are:

Town.	*Population.*
Sydney	1,127,470
Melbourne	1,000,000
Brisbane	308,580
Adelaide	330,217
Perth	196,251
Hobart	56,730

Production.—The following tables give vital production and manufacturing statistics:

ESTIMATED VALUE OF PRODUCTION, 1922-23 TO 1927-28.

Year.	Agricultural.	Pastoral.	Dairy, Poultry, and Bee Farming.	Forestry and Fisheries.	Mining.	Manufacturing.*	Total.
	£1,000.	£1,000.	£1,000.	£1,000.	£1,000.	£1,000.	£1,000.
1922-23	84,183	97,029	43,542	11,124	20,316	123,188	379,382
1923-24	81,166	110,075	42,112	11,866	22,232	132,732	400,183
1924-25	107,163	126,773	45,190	12,357	24,646	137,977	454,106
1925-26	89,267	113,327	48,278	12,784	24,594	143,256	431,504
1926-27	98,295	111,718	46,980	12,790	24,007	153,634	447,424
1927-28	84,256	125,068	50,261	12,181	22,983	158,562	453,311

* These amounts differ from those given in the following tables, owing to the inclusion in those tables of certain products which are included in dairy farming and forestry in this table.

MANUFACTURING INDUSTRIES, 1923-24 TO 1927-28.

Year.	No. of Establishments.	Hands Employed.	Salaries and Wages Paid.	Value of Plant, Machinery, Land, and Buildings.	Value of Materials Used.	Value added by Manufacture.	Value of Output.
	No.	No.	£	£	£	£	£
1923-24	20,189	429,990	77,278,265	182,114,600	197,038,726	141,242,417	348,577,583
1924-25	20,795	439,949	81,360,021	200,484,807	221,993,978	147,136,758	380,843,986
1925-26	21,242	450,920	86,724,683	208,813,782	231,834,908	155,424,259	400,342,393
1926-27	21,579	467,247	90,575,166	220,092,363	232,643,518	162,325,273	408,692,838
1927-28	22,775	464,196	91,365,319	231,254,208	221,349,693	167,402,772	416,994,009

MANUFACTURING INDUSTRIES: VALUE ADDED BY PROCESSES OF MANUFACTURE, 1924-25 TO 1927-28.

Industries.	1924-25.	1925-26.	1926-27.	1927-28.
	£	£	£	£
Treating raw materials, product of agricultural, pastoral, etc., pursuits ..	3,322,380	3,499,129	3,604,519	2,858,275
Treating oils and fats ..	1,795,164	2,003,918	1,821,323	1,737,596
Processes in stone, clay, glass, etc.	7,749,672	8,051,315	8,715,364	8,781,369
Working in wood	11,032,981	11,433,348	10,310,969	9,653,668
Metal works, machinery, etc.	30,504,947	33,612,075	35,268,116	35,048,536
Connected with food and drink, etc.	30,494,303	31,738,018	31,750,752	36,711,643
Clothing and textile fabrics, etc.	20,718,166	22,125,994	24,468,131	24,387,228
Books, paper, printing, and engraving	10,728,551	11,404,724	11,921,841	12,301,742
Musical instruments	510,306	535,482	762,113	697,502
Arms and Explosives	292,259	302,974	325,208	328,857
Vehicles and fittings, saddlery, harness	7,102,020	6,907,512	7,649,081	7,654,736
Ship and boat building and repairing	1,656,160	1,720,659	1,745,490	2,068,839
Furniture, bedding, and upholstery	4,212,392	4,446,370	4,978,719	4,895,298
Drugs, chemicals, and by-products	4,181,364	4,624,317	4,815,113	4,872,973
Surgical and other scientific instruments	216,325	219,277	234,238	248,122
Jewellery, timepieces, plated ware	713,874	709,394	685,506	695,694
Heat, light, and power ..	9,917,116	9,441,020	9,979,441	10,269,597
Leatherware, n.e.i.	589,602	629,168	3,027,046	3,919,906
Minor Wares, n.e.i.	1,399,176	2,019,565	262,303	271,191
Total	147,136,758	155,424,259	162,325,273	167,402,772

PRIMARY PRODUCTION, 1901-28.

	1901.	1911.	1921.	1928.
Agriculture:				
Wheat—Area, acres ..	5,115,965	7,427,834	9,719,042	12,279,088
Yield, bushels	38,561,619	71,636,347	129,088,806	118,198,875
Average, bushels	7·54	9·64	13·28	9·63
Oats—Area, acres ..	461,430	616,794	733,406	1,122,303
Yield, bushels	9,789,854	9,561,833	12,147,433	12,084,265
Average, bushels	21·22	15·50	16·56	10·77
Barley—Area, acres ..	74 511	116,466	298,910	322,318
Yield, bushels	1,519,819	2,056,836	6,085,685	4,960,021
Average, bushels	20·40	17·66	20·36	15·39
Maize—Area, acres	294,849	340,065	305,186	400,544
Yield, bushels	7,034,786	8,939,855	7,840,438	11,393,860
Average, bushels	23·86	26·29	25·69	28·45
Hay—Area, acres	1,688,402	2,518,351	2,994,519	2,632,119
Yield, tons	2,024,608	2,867,973	3,902,189	2,658,963
Average, tons	1·20	1·14	1·30	1·09
Potatoes—Area, acres ..	109,685	130,463	149,144	163,231
Yield, tons	322,524	301,489	388,091	470,041
Average, tons	2·94	2·31	2·60	2·88
Sugar cane—Area, acres ..	86,950	101,010	128,356	212,304
Yield, tons	1,367,802	1,682,250	2,436,890	3,764,439
Average, tons	15·73	16·65	18·99	17·73
Vineyards—Area. acres ..	63,677	60,602	92,414	113,252
Wine, gallons	5,816,087	4,975,147	8,542,573	17,302,611
Total value of all agricultural production	£ 23,835,000	£ 38,774,000	£ 81,890,000	£ 84,256,000
Pastoral, dairying, etc.:				
Live stock—				
Sheep, No.	72,040,211	96,886,234	86,119,068	100,827,476
Cattle, No.	8,491,428	11,828,954	14,441,309	11,617,056
Horses, No.	1,620,420	2,278,226	2,438,182	2,040,691
Pigs, No.	931,309	1,110,721	960,385	878,207
Wool production, lbs. greasy	543,131,661	721,298,288	721,678,346	888,129,780
Butter production, lbs. ..	103,747,295	212,073,745	267,071,340	280,037,404
Cheese production, lbs. ..	11,845,153	15,886,712	32,653,003	31,534,875
Bacon and ham, lbs. ..	34,020,629	53,335,092	58,626,469	75,001,674
Total estimated value of pastoral and dairying production	£ 36,890,000	£ 72,883,000	£ 119,399,000	£ 175,329,000
Mineral production:	£	£	£	£
Gold	14,017,538	10,551,624	4,018,685	1,938,971
Silver and lead	2,248,598	3,022,177	1,539,992	3,804,801
Copper	2,215,431	2,564,278	803,957	636,838
Tin	448,234	1,209,973	418,418	661,378
Zinc	4,067	1,415,169	283,455	1,178,119*
Coal (black)	2,602,733	3,927,360	10,983,757	12,039,766*
Total value of all mineral production	21,816,772	23,302,878	19,977,384	22,983,071*
Forestry production:				
Quantity of local timber sawn or hewn, 1,000 sup. ft.	452,131	604,794	590,495	570,521

* 1927 figures.

Overseas Trade.—The tables given below enable the reader to appreciate the trend of overseas trade.

EXTERNAL TRADE, 1924-25 TO 1928-29.

Year.	Imports.			Exports.		
	Merchandise.	Specie and Bullion.	Total.	Merchandise.	Specie and Bullion.	Total.
	£	£	£	£	£	£
1924-25	146,600,489	10,542,807	157,143,296	159,987,124	2,043,035	162,030,159
1925-26	151,217,425	420,753	151,638,178	143,282,515	5,489,419	148,771,934
1926-27	164,127,759	588,835	164,716,594	132,837,061	12,303,306	145,140,367
1927-28	146,936,540	1,008,430	147,944,970	139,472,322	3,740,748	143,213,070
1928-29	143,271,391	356,642	143,628,033	140,853,655	3,926,520	144,780,175

IMPORTS INTO AUSTRALIA OF THE UNDERMENTIONED CLASSES OF GOODS.

Classes of Goods.	1927-28.	1928-29.
	£	£
1. Foodstuffs of animal origin	2,866,708	2,369,324
2. Foodstuffs of vegetable origin and non-alcoholic beverages	6,605,536	6,246,194
3. Spirituous and alcoholic liquors	1,767,497	1,871,190
4. Tobacco and preparations thereof	2,960,620	2,694,330
5. Live animals	120,007	162,319
6. Animal substances (mainly unmanufactured) not foodstuffs	2,182,966	1,957,476
7. Vegetable substances and fibres	3,242,367	3,007,714
8. Apparel, textiles, and manufactured fibres	38,488,491	36,703,587
9. Oils, fats, and waxes	9,872,014	11,099,252
10. Paints and varnishes	778,663	784,042
11. Stones and minerals	1,060,830	1,010,639
12. Metals, metal manufactures, and machinery	42,801,886	42,854,315
13. Rubber and leather, and manufactures thereof	4,157,292	2,939,316
14. Wood and wicker, raw and manufactured	5,818,541	4,885,776
15. Earthenware, cement, china, glass, etc.	2,422,822	2,470,259
16. Paper and stationery	7,873,998	7,835,234
17. Jewellery, timepieces, and fancy goods	2,621,411	2,656,782
18. Optical, surgical, and scientific instruments	1,464,794	1,445,510
19. Drugs, chemicals, and fertilisers	4,811,212	5,176,240
20. Miscellaneous	4,979,163	5,100,621
21. Gold and silver and bronze specie	1,048,152	357,913

Summary.

Importing States:	£	£
New South Wales	65,081,801	63,503,493
Victoria	47,911,131	46,000,880
Queensland	11,760,214	11,594,842
South Australia	12,509,300	11,307,376
Western Australia	9,011,294	9,422,104
Tasmania	1,640,817	1,767,395
Northern Territory	30,413	31,943
Grand total	147,944,970	143,628,033

Total Imports.

Merchandise	146,936,540	143,271,391
Bullion and specie	1,008,430	356,642

SECTION II

CANADA

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Canadian labour shares the general prosperity of the Dominion. Hence there is no acute industrial problem. Another vital factor—taxation is low.

British Manufacturers

British Manufacturers cannot afford to overlook the immense possibilities offered for the establishment of branch industries in Canada.

Canada's domestic market, with nine millions of prosperous people, merits consideration. British branch factories operating in Canada are accorded the advantages of Imperial Preference in other Empire markets.

The undermentioned Canadian Government Trade Commissioners are ready at all times to provide accurate, detailed information to those interested. An enquiry involves no obligation, and their services are at your disposal without cost. Facts and figures, suited to your particular requirements, will be procured for you. These will convince you that the advantages Canada offers to the industrialist are too great to be ignored.

CANADIAN GOVERNMENT TRADE COMMISSIONERS

London: Chief Canadian Government Trade Commissioner in the United Kingdom, Canadian Building, Trafalgar Square, S.W. 1. (Territory covers Home Counties, South-Eastern Counties, and East Anglia.)

Glasgow: Gordon B. Johnson, 87, Union Street, Glasgow. (Territory covers Scotland & Northern Ireland.)

Bristol: Douglas S. Cole, Sun Buildings, Clare Street, Bristol. (Territory covers West of England, South Wales and South Midlands.)

Liverpool: Harry A. Scott, Century Buildings, 31, North John Street, Liverpool. (Territory covers North of England, Lincolnshire, North Midlands and North Wales.)

Dublin: John H. English, 66, Upper O'Connell Street, Dublin. (Territory covers Irish Free State.)

CANADA

CHAPTER I

Many excellent market openings in Canada are neglected by British manufacturers because they think it impossible to compete with imports from the United States. But a personal investigation of the market, or a detailed report from a reliable source, will often show that good openings exist for British products provided they are properly marketed. In many lines competition from cheap Continental products is very keen, but British manufacturers have the advantage of preferential tariff duties. The demand for good quality is steadily increasing, and better-class goods will always find a sale.

(Par of Exchange: $\$4{\cdot}86\frac{2}{3} = £1$ sterling.)

TEXTILES AND WEARING APPAREL

The market for textiles and textile products is of growing value to the British exporter. Competition from Canadian and American manufacturers is very active, and home—*i.e.*, Canadian—production is steadily increasing. There are some 1,700 establishments in Canada manufacturing textiles and textile products, including 40 cotton mills, 130 woollen establishments, 188 establishments producing men's clothing, 385 producing women's clothing, 167 making hosiery, knitted goods, and fabric gloves, and about 12 producing silk and silk goods. Despite this large volume of home production, however, imports of fibres, textiles and textile products during 1928-29 reached a total value of $206,444,044. Of this total about two-fifths came from the United Kingdom; the greater part of the remainder was imported from the United States.

Preferential Tariff.—The preferential tariff treatment granted to British products is of great importance. To obtain preferential rates, at least 50 per cent. of the cost of production must be of Empire produce or manufacture. The British preferential tariff on textiles and textile products varies from $7\frac{1}{2}$ per cent. to 15 per cent. *ad valorem* on cotton yarns to 30 per cent. *ad valorem* on artificial silk clothing and wearing apparel. The intermediate tariff varies from 10 per cent. to 35 per cent. *ad valorem,* and the general tariff from 15 per cent. to 35 per cent. *ad valorem*. The British manufacturer thus enjoys a substantial advantage over American and other foreign competitors.

The tariff on manufactured and semi-manufactured imports is partly designed as a protective tariff in aid of the home manufacturer. With this end in view, lower duties are levied on articles such as cotton and woollen yarns, cotton fabrics, lace, embroideries, silk yarns, woven fabrics of silk or artificial silk, etc., when imported by manufacturers for use in their own factories in manufacturing processes. British manufacturers should therefore consider the advisability of establishing branch factories in Canada; piece-goods, etc., could then be produced in the English factory and imported into Canada at the lower duties for making up into the finished article in the Canadian factory.

Cotton Goods.—In cotton goods British manufacturers are faced by keen home competition in the low and medium grades, the Canadian manufacturer having devoted his attention mainly to coarser fabrics. The cotton goods market of the future is in the finer counts, where quality is the primary consideration. Mercerized cotton yarns are in demand and meet with no home competition. In woollens the market is largely for medium and low quality goods, although high quality branded products are in steady demand.

Men's Wear.—The distinctive nature of the Canadian market is well illustrated by the demand for men's clothing, shirts, and underwear. Ready-made suits and overcoats have

a much larger proportionate sale than in England, and English overcoats are in growing demand. The English style of shirt, which is pulled on over the head, will not find a sale in Canada. Shirts must be of the tunic type, fastening right down the front, and the back stud must rest against a pad, not against the neck. Two-piece underwear is not popular, the Canadian preferring a combination vest and pants.

A good demand exists for British men's wear, sports suits, golf hose, raincoats, and weatherproofs, soft and hard felt hats, good quality cloth caps, and silk neckwear. English fashions are largely followed in sports wear. The market for hats and caps deserves more attention, high-quality English hats being in steady request. English ready-to-wear overcoats are in demand among tourists from the United States.

Underwear.—In underwear, both for men and women, medium and heavyweight articles are the most popular. But it must be remembered that, owing to different climatic conditions, the demand in, say, British Columbia, is not the same as in Eastern Canada. Silk and artificial silk products find a good market, and the demand for artificial silk underwear and hosiery is steadily growing. Hosiery of medium weight is preferred. Sports costumes for women have a ready sale.

The future for British trade in textiles and textile products depends largely upon the marketing methods employed. The practice of dealing direct with the retailer does not pay; it simply results in a much smaller demand for goods, for the retailer will not go to the trouble of importing direct. Dealers would buy more English lines if visited more often by the representatives of manufacturing firms.

CHAPTER II

The years 1924-29 *have seen an unprecedented increase in the Dominion's prosperity. This growing prosperity provides great opportunities for British manufacturers to expand their trade with the Dominion, for sentiment largely favours British as against other imported goods, and the preferential import tariff gives them substantial advantages.*

An outstanding feature of Canada's development during the post-war period has been the progress of her secondary industries. The annual value of her manufacturing output now exceeds the market value of her agricultural products, and manufacturing industry will, in the near future, constitute the principal source of national income.

MACHINERY AND PLANT

Increasing competition necessitates the most economical methods of production, and new machinery and equipment are constantly being installed. It is satisfactory to find evidence that British manufacturers are showing a keener desire for trade. British products have an excellent chance, in spite of the American hold on the market, providing they are brought to the direct notice of the consumer. Participation in exhibitions, particularly in the annual Canadian National Exhibition at Toronto, is of vital importance.

Capital Investment.—Two valuable aids to demand are the investment of British capital in Canada and the establishment of branch factories of British manufacturing houses. The increased investment of American capital in industrial undertakings in Canada has resulted in a great increase in the demand for American plant and equipment. British investors, however, are now taking greater interest in the Canadian market.

It is estimated that there are in Canada more than 700 branch plants of American works, which employ American expert mechanics who prefer American-type machinery. The number of British branch factories in Canada is steadily, though slowly, increasing. An extension of this policy, and the importation of British workmen, would result in a considerable increase in the demand for British machinery products.

Preferential Tariff.—The preferential tariff treatment granted to imports from this country is of great value. British printing presses, machines, and machinery are admitted free, while foreign imports are liable to a duty of 5 per cent. to 10 per cent. *ad valorem*. British sewing-machines receive a preference of from $7\frac{1}{2}$ per cent. to 10 per cent. *ad valorem*, typewriters 5 per cent. to $7\frac{1}{2}$ per cent., logging machinery 5 per cent. to 10 per cent. Machinery of a kind not made in Canada is admitted free or at a low rate of duty.

Trade Openings.—British manufacturers have an appreciable share of the trade in sewing-machines and parts, logging equipment, pulp and paper mill machinery, and textile machinery. In each of these lines sales can be extended. Good openings exist for machinery for cotton and woollen mills and for the hosiery, silk, and knit goods industries.

All groups of the Canadian iron and steel industry are showing a general advance in output, and demand for machinery and equipment is constantly growing. Rolling-mill machines, metal-working machinery, cranes and derricks, steam, electric, and other power shovels, power pumps and lathes, trucks, grinding machines, and other plant and equipment are in increasing request. Machine drills and machine tools have good sales. The openings in this branch of the machinery market are clearly shown by the announcements of plant enlargement and extension by Canadian companies.

Mining Plant.—The greatly increased activity in mining has resulted in a growing demand for mining plant and equipment. Imports of mining and metallurgical machinery and equipment have steadily expanded since 1925-26. Each item

recorded increases in 1928-29 as compared with the preceding year. Imports of diamond drills and parts rose from a value of $687,299 to $872,040; of ore crushers and stamp mills from $542,932 to $669,028; of rock drills from $472,752 to $635,189; of well-drilling machinery and equipment from $807,741 to $1,779,221; and of other mining and metallurgical machinery from $1,033,230 to $1,570,243.

These lines present excellent openings for British products. The trade is largely in American hands, heavy increases being shown in every item in 1928-29, while imports from the United Kingdom declined. The only class in which British products have a fair share of the trade is in ore crushers and stamp mills.

Other Machinery.—Printing presses, type-setting machines, and other printing and bookbinding machines find a rapidly increasing market. Other industries which are steadily expanding, and for which machinery and equipment are constantly in request, are those concerned with rubber, chemical, and allied products, furniture and other branches of woodworking, boots and shoes, leather, automobiles, sugar, meat-packing, and the non-metallic trades. All these present openings for British products.

Coke and gas machinery and coal handling and washing machines have a good sale. Cement machines, concrete-mixing machines, ice-making and refrigerating machinery, and fire-extinguishing apparatus are in demand. There is a ready sale for typewriters and for adding and other office machines. Domestic washing machines and other household machinery are in demand, imports in 1928-29 being valued at $1,878,397, as compared with $1,472,035 in 1927-28.

Agricultural Implements.—Farm implements and machinery have an excellent market. This trade is almost entirely in American hands. Careful attention to market requirements should result in greatly increased sales of British dairy, harvesting, and other machinery. Imports of traction engines for farm purposes show a great increase in recent years.

During the year 1928-29, total imports of farm implements and machinery were valued at $40,292,899, as compared with $29,636,449 in the preceding year. The chief increases were in harvesters, ploughs and parts, threshing machine separators, and traction engines for farm purposes. Imports of the last-named item were valued at $18,931,613, nearly treble the value of imports in 1926-27. The demand is almost entirely for engines valued at less than $1,400 each.

CHAPTER III

Points which need special consideration in exporting goods to Canada are the variation in demand in different areas, the methods of packing in request by wholesalers and retailers in different trades, and the patterns and designs demanded by the consumer. The tastes of the public differ widely in various provinces. In British Columbia, for example, tastes are very similar to those of the people of Great Britain; in other areas they are similar to those of the inhabitants of the United States. Special methods of packing certain lines are favoured by the Canadian importer, and the sales value of goods is increased if such desires are met. Attractive containers have a favourable influence upon sales. Firms' representatives in Canada should be instructed to observe and report upon changes or tendencies in design.

ELECTRICAL EQUIPMENT

The rapid development of Canada's water-power resources has been a very important factor in the progress of the Dominion during the post-war period. This development has rendered her largely independent of coal as a source of power —a factor of vital importance in the coalless provinces of Ontario and Quebec. The expansion of hydro-electric enterprises is clearly shown by the total installation of water-power, which increased from approximately 2,500,000 h.p. at the end of 1920 to nearly 5,350,000 h.p. on January 1, 1929.

Sources of supply are now well distributed from coast to coast. Electric power is in widespread use for domestic purposes, not only in the towns but also in the rural areas. It is being increasingly used in industry—the pulp and paper industry being the largest consumer—and on the farms. A

number of important schemes are in hand, particularly those on the Saguenay, St. Maurice, and Gatineau rivers, and others are in preparation.

American Competition.—These developments present a market for British electrical machinery and equipment which is well worth careful attention. Competition from Canadian and United States of America manufacturers is very keen. The Canadian output of batteries, generators, transformers, lighting fixtures, domestic appliances, wire and cable, etc., has a selling value of more than $70,000,000 per annum. The British share of the import trade is extremely small. Total imports for the year ended March 31, 1929, were valued at $26,775,215, as compared with $19,044,465 in 1927-28. Imports from the United Kingdom in 1928-29 were worth only $1,927,193; while American imports were valued at $24,410,750. Imports from the United States in 1928-29 showed a large increase over the total for the preceding year, but British imports only showed a small expansion.

The market is not an easy one for British manufacturers. American standards for electrical goods have been generally adopted, and differ considerably from British standards. A development of considerable importance to British manufacturers is the formation of the Canadian Engineering Standards Association, which was established towards the end of the war. Part I. of the Canadian Electrical Code has been published, and should be carefully studied by manufacturers.

It is very satisfactory to find evidence that British manufacturers of electrical products are now paying more attention to this market. The preferential tariff is of considerable assistance to British exporters. The majority of electrical imports of United Kingdom manufacture are subject to an import duty of 15 per cent. *ad valorem,* while goods entering under the general tariff—which applies to American products—pay a duty of 27½ per cent. *ad valorem.*

Dynamos, Generators, and Motors.—Imports of dynamos and generators in 1928-29 were valued at $1,557,009,

compared with $1,328,628 in the preceding year; and of electric motors $4,306,317, against $2,964,123. The value of the British share of the trade in dynamos and generators, however, actually decreased in value from $389,820 to $294,116, while American imports increased. British imports shared in the increased trade in motors, rising to a value of $547,644. Imports of storage batteries, valued at $631,557, expanded compared with the figure for 1927-28; the British share rose in value from $236,485 to $319,258; and the American from $290,496 to $312,274.

Apart from these three classes of imports, the trade is almost entirely in American hands. There is a good demand for transformers, switches, and switchboards, controlling and protective devices, ignition apparatus, such as sparking plugs and magnetos, etc. Telegraph and telephone instruments have a ready sale. All these lines present opportunities for an expansion in the British share of the trade.

Electricity in the Home.—The exceptionally good openings for every kind of electrically operated household and farm appliance is shown by the proportion of "wired" houses, a proportion larger than in any other country. The low cost of electric power has resulted in an increasing use of electricity in the home, and from every part of the Dominion a rapid growth is reported in the demand for electric ranges, washers. water heaters, air heaters, grates, vacuum cleaners, grills, hotplates, ironers, toasters, fans, refrigerators, etc.

Imports of electric heating and cooking apparatus, vacuum cleaners, fans, and meters have steadily expanded, but the British share of the trade is very small. Yet excellent openings exist for manufacturers who will cultivate the market.

Electric light fixtures and parts have a growing sale, and there is a demand for self-contained lighting outfits. These markets are all in American hands at present, but British products should obtain a larger share of the trade if exporters made a careful study of the requirements of the Canadian consumer.

Imports of electric arc lamps showed an increase. The trade in carbon filament incandescent electric lamps is largely in the hands of Japanese exporters, although German firms have a fair share of the trade. Metal filament lamps are obtained from Japan, the United States, Austria, and Germany.

CHAPTER IV

In making British goods known it should be remembered that advertising copy which suits the British public generally does not "pull" in Canada. The Canadian expects to be told all about the product in the advertisement. Advertisements consisting only of a branded name have but little "pulling" value, and represent so much wasted expenditure. The name and address of the agent, representative, or branch factory in Canada must be prominently displayed.

The basis of any advertising campaign is the daily Press. The Canadian is a keen believer in newspaper advertising, and can best be reached by means of a well-conducted Press campaign spread evenly over a period. Spasmodic advertising is of little use.

In addition to the campaign in the daily Press, the weekly journals, high-class magazines, and the trade and technical Press must be used.

HARDWARE AND CUTLERY

The market for hardware and cutlery has shown a steady expansion during the post-war period. Representatives of British firms who toured Canada in 1928 and 1929 found business very satisfactory. Competition from the home product is severe, and there is also competition from the United States. In 1928 the total imports of hardware and cutlery were valued at $4,774, 857, and while imports from the United States were valued at $2,869,146, those from the United Kingdom were worth only $1,133,033. Compared with the preceding year, imports increased in value by $677,285. The United States figures increased by $529,974, while in the case of the United Kingdom they were worth $121,500 more.

Cutlery.—In the cutlery market British firms possess some 75 per cent. of the import trade in knives and forks, but the market for pen-knives, jack-knives, pocket-knives, etc., is largely in German hands. Demand for table cutlery of high quality shows a steady increase, and this line deserves much closer attention from British firms. Some progress has recently been made, but more activity is necessary, in the appeal both to the trade and to the public. Canadian table cutlery and other ware suitable for gifts now have a firm hold on the market, largely because their quality is widely known. The prestige of Sheffield ware has suffered considerably in recent years, and if sales are to increase every effort must be made to re-establish and extend that prestige.

Hardware.—In the hardware market American firms have the greater part of the import trade. In builders', cabinet-makers', upholsterers', and carriage hardware, for example, out of total imports valued at $551,426 in 1927-28, British firms only supplied goods to the value of $50,723. The hardware market for British goods in capable of considerable expansion, particularly in the better quality lines. But matters must not be left in the hands of the Canadian wholesale houses. The wholesaler often receives a bigger margin of profit from American and Canadian lines, with the result that these receive the greater share of his attention. The markets outside the large towns are steadily growing, and a special investigation into the needs of the grain, dairy, and poultry farmers would prove of considerable value. The farming community requires tools, household utensils, dairy pails, etc., and the growing poultry industry of British Columbia and other provinces provides an increasing demand for fencing, pails, door hinges, incubators, etc. This demand is mainly seasonal in character.

Market Openings.—Lines in general demand, in which considerable activity has recently been shown, are wire and other nails, spades and shovels, roofing material, garden tools, small hand tools, poultry netting, rope, fence, and barbed

wire, mops, window screens, lawn mowers, and horse clippers. English firms are beginning to secure a share of the lawn-mower business. A good market exists for household utensils; aluminium-ware and wire kitchen-ware have a ready sale. Cast-iron enamel-ware, tin-ware, stoves and furnaces, skates and other sports goods, saws, high-grade mining and lumbering tools, wheelbarrows, and pipe tools are in steady demand. Hardware for camping purposes is in request in the spring and summer. The market for paints, varnishes, and enamels is of considerable value, and deserves close attention from British manufacturers.

Builders' Hardware.—The demand for builders' hardware has shown a great increase during the last few years, owing to the great activity in building. Many large building contracts are in hand, particularly in the West, and further important construction schemes are contemplated. But while certain British hardware firms which were well established in the market before 1914 have extended their activities, not enough attention has been given by other British manufacturers to the possibilities.

Severe competition is experienced from both Canadian and American products, particularly in the cheaper lines, but a more active and intelligent study of the market would lead to good results. Canadian tastes must be carefully considered. Door fittings, for example, should be uniform, and British exporters must be able to supply full sets. If necessary, firms making the separate items should combine for purposes of export trade with Canada. Representatives must keep in close touch with building contractors, and report details of contemplated building.

CHAPTER V

The market for imported goods is mainly for quality lines or for specialities. The reputation for quality enjoyed by British products is of considerable selling value, but manufacturers must not be content to base their selling efforts on that reputation alone. They must get their products to the consumer by well-organized publicity campaigns. The best selling factors are quality allied to a branded name. Slogans such as "Buy British" have very little selling value; goods should be stamped or marked with "Made in England," and carry the maker's brand.

GROCERIES AND CONFECTIONERY

The market for groceries and confectionery products needs careful handling, and a close study of the consumer's tastes, competitive lines, distribution methods, etc., is vital to success. In the majority of cases very keen competition is experienced from Canadian and American products. British manufacturers should remember that a high percentage of the inhabitants are British born. Tastes developed in the home country are retained, and food products that were familiar in the home market will find a ready sale. Branded lines of British pickles, sauces, confectionery, etc., are consequently in good demand.

Pickles and Sauces.—During the twelve months ended March 31, 1929, imports of pickles and sauces totalled 474,163 gallons, valued at $604,396, compared with 497,528 gallons, valued at $659,396, in 1927-28. Of the total in 1927-28, 239,099 gallons, worth $418,936, consisted of sauces and catsups in bottles, the British share of this trade being $242,704. Sauces and catsups imported in bulk were valued at $31,253, and were mainly obtained from the United States.

Imports of pickles in bottles, jars, and similar vessels were valued at $141,423, of which the British share was $107,382. Pickles in bulk, worth $26,937, were obtained mainly from Japan.

Imports of vinegar are valued at about $100,000 per annum. Competition is mainly from the United States; malt vinegar is usually preferred. Mustard imports in 1928-29 were worth $477,645, of which imports from the United Kingdom were valued at $441,494. The English dry mustard, packed in tins, is preferred to the Continental variety, and demand is steadily growing.

Jams.—Jellies, jams and preserves, and mincemeat have an excellent market, and imports are increasing. In 1928-29 their value was $330,019, compared with $334,862 in 1927-28; the British share of the import trade in 1928-29 was worth $141,892, a decline of $40,000 as compared with the preceding year. British manufacturers should pay close attention to local taste. The jam demand is mainly for 4 lb. tins, though 1 lb. jars have a sale in urban areas. It must be realized that the family consumption of jam in Canada is much larger than in Great Britain, and that bigger containers are therefore necessary; the ½ lb. jar, common in the home country, will not find a sale in Canada. In marmalades, also, the demand is mainly for 4 lb. tins, but 2 lb. tins and 1 lb. jars find a fair sale.

Pickled and Canned Fish.—Fish products are in good demand, particularly in those areas inhabited by Roman Catholics. Imports of pickled herrings in 1928-29 were valued at $312,819; these are chiefly imported in kegs, half the total coming from Newfoundland. Smoked herrings are largely obtained from the United Kingdom, which supplied 206,909 lb. in 1928-29, compared with 179,123 lb. in the preceding year; this market is capable of still further expansion by British producers. The demand for canned herrings shows a steady growth; British lines have a firm hold in this market. A good demand exists for herrings in tomato sauce. Sardine

imports also show a rapid increase; the demand is mainly for fish packed in tins weighing 8 oz. or less, the market being supplied chiefly from Norway.

Canned Meats and Game.—A good market exists for canned meats and canned poultry and game. British lines have a fair share of the market, but in 1928-29, although total imports at 5,918,875 lb. were much larger than in 1926-27, the British share was only 637,485 lb., as compared with 1,625,147 lb. in 1926-27. The trade has been captured by Argentina, and needs careful attention if even this share is to be retained. There are excellent openings for British goods, which receive a preference over goods imported under the general tariff of 10 per cent. *ad valorem*. Imports of extracts of meats and fluid beef, not medicated, from the United Kingdom receive a similar tariff preference; British firms have a strong hold on this trade. Canned soups are also in good demand.

Fruits, Tea, Biscuits, etc.—Canned fruits and vegetables find a growing market, mainly supplied by imports from the United States. Imports of dried fruits are increasing, as also are imports of fruit juices, such as lime juice, etc.; British supplies are growing and should develop still further in the future. Other grocery lines for which there is a good demand are biscuits, packet tea, baking powder, custard powder, coffee, and coffee extracts and essences. The demand for imported biscuits is expanding and should provide good opportunities for British products. There is keen competition, mainly from the United States. British lines predominate in the market for unsweetened biscuits, but American products largely control the market for the sweetened variety. The market for packet tea supplies good openings for British exporters, provided proper distribution is obtained. The baking-powder market is highly competitive and must be handled with great care. Custard powders are in good request, and British products sell well. There is a fair opening for imported coffee, which is preferred in 1 lb. tins.

Sugar Products.—Cocoa, chocolate, confectionery, and other products containing sugar have a ready and increasing sale. Between 1910 and 1923 the *per capita* consumption of sweets, chocolate, and cocoa more than doubled, and demand since the latter date has shown a further increase, although the market fluctuates considerably. Competition from Canadian and foreign firms is very keen, but British products will find good sales provided the market is properly cultivated and careful attention is given to popular taste.

Total imports of candy were valued at $4,840,897 in 1928-29, as compared with $4,891,600 in 1927-28. Imports from the United Kingdom were worth $3,237,111 and $3,219,645 respectively. The remaining imports are chiefly from the United States. It is satisfactory to note that imports from the United Kingdom increased in 1928-29, while those from the United States declined. Included in this class of goods are candied peel, confectionery coated with or containing chocolate, flavouring powders, custard powders, jelly powders, preserved ginger, and sugar candy, and confectionery of all kinds. Good openings for British products exist in these lines.

Cocoa and Chocolate Confectionery.—Imports of preparations of cocoa and chocolate reach a total value of some $140,000. The market is mainly in the hands of American and Dutch firms, but presents good openings for British products. Cocoa butter is in great demand, more than 5,000,000 lb. being imported each year. Over half the total is supplied by Dutch firms, while imports from America and Germany are of importance. This market deserves closer attention from British firms.

The cocoa, chocolate, and confectionery markets present certain outstanding features. Sales are not confined to the grocery stores, for a very large proportion of the trade is done through the drug stores. The leading makes of British cocoa are making good headway. The chocolate market is much more difficult. The general taste is for chocolate candy, and strong competition is experienced in high quality lines from local makes. Sales of certain well-known lines of British

plain chocolate are increasing, as the result of good publicity and distribution. An expanding market exists for English toffee.

Tariff duties and regulations should be carefully studied. The duty on confectionery coated with or containing chocolate, and on other confectionery products, is levied both on weight and on an *ad valorem* basis. The weight, for purposes of duty, includes the weight of wrappings and cartons.

CHAPTER VI

A glance at the map of Canada will convince the manufacturer of the extent of the market. But it is unfortunately true that many British exporters have been content to have a sole representative, without a sales organization covering the whole territory. Representation is of vital importance in any sales campaign, yet agents are often appointed by letter simply on their own statement that they can handle the line.

POTTERY, GLASS, AND GLASSWARE

The market for imported earthenware, stoneware, china, porcelain, glass and glassware merits close attention. British exporters should emphasize in advertisements the desirability of table and decorative ware being of the same high standard as other household goods.

In the majority of pottery and glass items, imports from Great Britain enjoy a substantial measure of tariff preference. This varies from 2½ per cent. *ad valorem* on plate glass up to 7 square feet in size, to 12½ per cent. *ad valorem* on tableware of china and porcelain, crystal-glass tableware, cut glass, etc. Import duties under the British preferential tariff are 7½ per cent. *ad valorem* on common and colourless window glass, and plate glass up to 7 feet square; 15 per cent. *ad valorem* on plate glass from 7 feet to 25 feet square, tableware of china and porcelain, and drain tiles; 17½ per cent. *ad valorem* on glass in sheets or bent plate glass; and 20 per cent. *ad valorem* on crystal-glass tableware, cut glassware, earthenware, stoneware, and tiles for mosaic flooring.

Pottery and Chinaware.—The value of imported pottery and chinaware was $4,886,062 in 1928-29, as compared with $4,930,329 in 1927-28. The trade is largely in British hands, but the value of imports from the United Kingdom fell in

1928-29, while those from America increased. Competition from Germany is of growing importance, and Japan, Czechoslovakia, France, and America are keenly interested in the market. Local competition is small.

Quality Lines.—Careful attention to requirements is essential if British manufacturers are to retain their hold on this valuable market. The steady increase in the prosperity of the Dominion indicates an expansion in the demand for quality pottery in the future. A good market also exists for second-class and cheap pottery, particularly in the areas outside the large towns. Energetic marketing and advertising campaigns would result in a considerable increase in sales. High-grade chinaware for decorative purposes will always sell if brought direct to the notice of the consumer.

General kitchen and bedroom ware is in good demand. Imports of earthenware and stoneware have an annual value exceeding $500,000; the United Kingdom is the chief source of supply. Foreign competition is mainly from America, Germany, and Japan, and home production has attained considerable dimensions. Sanitary-ware of British origin finds a ready demand in hospitals and other public institutions.

Tiles.—China clay is bought in large quantities, imports in 1928-29, valued at $247,391, showing an increase on the figure for the preceding year; the United Kingdom has some 50 per cent. of the trade. Tiles of all kinds are in growing request. Imports of tiles or blocks of earthenware or stone for mosaic flooring are steadily expanding. The sale of British tiles can certainly be stimulated by energetic marketing methods.

Glass and Glassware.—Despite a fairly large local production of both the more expensive and cheaper classes of glass and glassware, total imports of these products were valued at $9,717,519 in 1928-29, as compared with $8,129,616 in the preceding year. United States imports increased in value from $4,069,675 in 1927-28 to $4,861,164 in 1928-29. The British share of the trade, valued at $1,226,413 in 1928-

29, showed a fall as compared with the figure for the preceding year.

Cut glass and good-class tableware find a ready sale. Imports in 1928-29 were valued at $1,048,599, as compared with $901,029 in the preceding year. More than half the total is supplied by the United States, but the British share, valued at $66,099 in 1928-29, showed an increase on 1927-28 figures. Competition from cheap Continental goods is of growing importance, particularly in decorative tableware. Buyers from the big Canadian stores pay periodical visits to England and the Continent, many lines being bought direct from the manufacturer. It is therefore essential that British manufacturers should keep themselves informed of such visits.

Imports of plate glass, not bevelled, reach a substantial total each year. British products hold a leading place in this trade, but competition from Belgium is very keen. The United Kingdom has some 50 per cent. of the trade in other plate glass, in glass in sheets, and in bent plate glass; competition is from the United States, Belgium, and Germany.

CHAPTER VII

Points which should be carefully studied in marketing campaigns are the terms of payment common to buyers in the market, methods of payment, samples, buying seasons, packing, advertising, and Customs and other regulations. British exporters should realize that they cannot do business with Canadian buyers or agents on the basis of "cash against documents" or "cash before shipment." Credit given both by Canadian and by American traders varies from thirty to ninety days, and British exporters must be prepared to do business on these terms. Discounts for immediate payment vary according to the particular trade. The exporter must be prepared to stand any risk incurred and to pay for advertising required.

WIRELESS APPARATUS

CERTAIN articles once considered as luxuries are now ranked as necessaries. A wireless receiving set is essential to modern life in Canada, and the market for wireless apparatus has shown a phenomenal growth during the last four years.

It is estimated that there are now more than 400,000 radio receivers in Canada, and that nearly 30 per cent. of the population own radio sets.

A growing market is therefore open to British manufacturers of wireless apparatus. Six leading firms in Canada have recently formed a combine known as Canadian Radio Patents, and have pooled their patent rights. Before endeavouring to market sets or valves, therefore, British manufacturers should make inquiries regarding patent rights, for if they do not they are likely to incur an action for infringement. The question of royalties must also be investigated.

Recent researches have shown how little interest is taken in this market by British manufacturers, and it is almost impossible to find an English receiving set in the Canadian market. At the Canadian National Exhibition in Toronto in 1927, not one English receiving set was on exhibition; one loud speaker and one transformer were the only English exhibits in the radio section. A few English loud speakers are on sale in the chief cities, but English wireless valves (or radio tubes, as they are called in Canada) are unknown.

The following import figures for 1926-27 and 1927-28 show how the United States has gained control of the trade:—

Item.	1926-27.	1927-28.
	$	$
Radio and Wireless Apparatus:		
Total	2,574,288	3,491,087
From U.K.	96,226	104,289
From U.S.A.	2,456,557	3,383,928
Radio Tubes—*i.e.*, Valves:		
Total	134,125	209,922
From U.K.	22,223	23,784
From U.S.A.	106,495	182,670

In 1928-29, total imports of wireless apparatus were valued at $5,939,116, an enormous increase on 1927-28 trade. This increase, however, was entirely in American lines, imports from the United Kingdom actually falling to $115,989.

Short-Wave Sets.—The market is for short-wave sets. The multiplicity of American stations has made ultra-selectivity a paramount need of the Canadian listener. Receiving sets must have a high degree of selectivity and be capable of picking up long-distance stations. The set must be well finished; it must give a good volume and have few controls; the type with reaction on the aerial is definitely not required. The "all-mains" set, which gets its current entirely from the electric mains, is generally accepted and appears to have come to stay.

One great advantage possessed by the sets made in the United States and Canada as compared with those from Great Britain is the high degree of finish. British cabinets generally compare unfavourably with the American and Canadian products. It is perhaps advisable, therefore, for British manufacturers to send the various units to Canada and have the sets assembled there, the cabinets being made in Canada.

Portable Sets.—One market which offers excellent prospects to the British manufacturer is that for portable sets. It is generally admitted that in this field the products of British firms compare very favourably with those of any competitor, and a careful investigation of market possibilities should give good results. The rapid increase in the number of cars sold provides a growing market for wireless sets weighing from 30 lb. to 35 lb., which can be taken anywhere with the greatest of ease. A favourable factor in this section of the radio market is the absence of any keen competition.

Canada is making the bulk of her own radio sets, but she still imports sets from the United States at the rate of some 9,000 a month. The market certainly has not reached saturation point, and is not likely to do so during the next few years.

CANADA

MARKET DATA

Area and Population.—The Dominion of Canada has an area of 3,729,665 square miles. It includes the following provinces and territories: Prince Edward Island, Nova Scotia, New Brunswick, Quebec, Ontario, Manitoba, Saskatchewan, Alberta, British Columbia, Yukon Territory, and the North-West Territories. The populations in 1911 and 1921, and the estimated population at June 1, 1928, were as follows:

Area.	1911.	1921.	*June* 1, 1928.
Prince Edward Island	93,728	88,615	86,400
Nova Scotia	492,338	523,837	547,000
New Brunswick	351,889	387,876	415,000
Quebec	2,005,776	2,361,199	2,647,000
Ontario	2,527,292	2,933,662	3,299,000
Manitoba	461,394	610,118	655,000
Saskatchewan	492,432	757,510	851,000
Alberta	374,295	588,454	631,900
British Columbia	392,480	524,582	583,000
Yukon Territory	8,512	4,157	3,500
N.W. Territories	6,507	7,988	9,200
Total	7,206,643	8,788,483*	9,658,000

* Including Royal Canadian Navy—485.

Production.—The following tables give the net value of all production, and statistics of leading industries. The growth of manufacturing industry is an outstanding feature of Canada's post-war development.

NET VALUE OF PRODUCTION.*

Industry.	1922.	1926.
	$	$
Agriculture	1,148,693,525	1,373,344,000
Forestry	266,406,716	312,844,584
Fisheries	41,800,210	56,360,633
Trapping	16,814,302	17,609,036
Mining	184,297,242	240,437,123
Electric power	62,173,179	88,933,733
Total primary production ..	1,720,185,174	2,089,529,109
Construction	220,460,235	251,088,323
Custom and repair	58,053,266	68,743,000
Manufactures	1,198,434,407	1,519,179,246
Total secondary production ..	1,476,947,908	1,839,010,569
Grand total†	2,939,313,953	3,613,455,948

* The net value of production represents an attempt to eliminate the value of materials consumed in the productive process. In 1926 the proportion of manufactures, freed from all duplication, to the grand total was 33·3 per cent.

† Eliminating all duplication.

PRINCIPAL STATISTICS OF FORTY LEADING INDUSTRIES, 1927.

Industry.	*Establishments.*	*Net Value of Products.*	*Gross Value of Products.*
		$	$
Pulp and paper	114	134,516,673	219,329,753
Flour and grist-mill products	1,315	28,028,873	191,741,470
Slaughtering and meat packing	76	34,144,531	167,220,892
Central electric stations	1,097	104,033,297	134,818,567
Sawmills	2,720	56,181,854	133,620,554
Automobiles	11	40,248,757	128,700,514
Butter and cheese	2,872	29,422,876	122,523,882
Rubber goods, including footwear	44	46,689,228	91,413,730
Electrical apparatus and supplies	130	45,823,855	78,558,730
Non-ferrous metal smelting	10	45,479,578	77,996,265
Cotton yarn and cloth	39	36,521,688	75,818,876
Railway rolling stock	35	35,948,463	74,466,912
Castings and forgings	328	42,603,224	69,395,343
Bread and other bakery products	2,443	32,946,572	68,726,262
Petroleum	23	11,468,899	64,528,820
Printing and publishing	720	47,528,831	62,030,896
Sugar refineries	8	13,363,810	60,502,664
Clothing, women's factory	428	24,416,410	56,316,064
Cigars and cigarettes	79	38,450,995	55,801,338
Hosiery, knit goods, and gloves	168	26,952,565	55,222,395
Biscuits, confectionery, and chewing gum	294	27,979,460	53,128,888
Breweries	73	34,056,725	51,528,024
Planing mills, sash and door factories	771	21,612,230	47,955,548
Boots and shoes, leather	191	22,806,126	47,372,549
Rolled products, pig-iron, steel products, etc.	36	26,577,324	45,571,264
Machinery	160	29,324,162	44,602,135
Sheet metal products	144	21,705,964	43,855,416
Clothing, men's factory	204	21,950,926	43,286,614
Agricultural implements	65	23,678,873	42,996,288
Printing and bookbinding	862	24,237,168	35,826,439
Furniture and upholstering	334	21,579,088	35,733,818
Leather tanneries	98	10,142,661	32,489,889
Fish-curing and packing	773	12,719,763	31,084,609
Acids, alkalis, etc.	42	15,079,060	30,740,846
Furnishing goods, men's	146	12,421,896	28,095,715
Coffee and spices	61	5,895,831	26,288,506
Distilleries	17	19,309,296	25,660,985
Paints and varnishes	62	12,294,815	25,229,454
Hardware and tools	128	12,128,031	24,470,656
Brass and copper products	99	11,507,939	24,054,657
Total, forty industries	17,220	1,266,778,317	2,728,706,227
Grand total, all industries	22,936	1,635,923,936	3,425,498,540

Overseas Trade.—The following tables give the trend and nature of Canada's overseas trade. The first table clearly shows that the United Kingdom has lost her hold on the market. In 1885-86 the United Kingdom had 40·7 per cent. of Canada's import trade, while the United States had 44·6 per cent.; in 1913-14 the shares were 21·4 per cent. and 64 per cent., and in 1928-29 15·3 per cent. and 68·6 per cent. respectively.

Year Ending March 31.	Canadian Trade with—			
	U.K.	U.S.A.	Other British Empire.	Other Foreign Countries.
	Imports.			
	$	$	$	$
1886 ..	39,033,006	42,818,651	2,383,560	11,756,920
1914 ..	132,070,406	396,302,138	22,456,440	68,365,014
1922 ..	117,135,343	515,958,196	31,973,910	82,736,883
1929 ..	194,020,573	868,055,897	63,377,958	140,223,880
	Exports (Canadian).			
1886 ..	36,694,263	34,284,490	2,262,803	3,515,148
1914 ..	215,253,969	163,372,825	23,388,548	29,573,097
1922 ..	299,361,675	292,588,643	46,473,735	101,816,627
1929 ..	429,730,485	500,167,599	106,295,532	327,393,056

IMPORTS FOR CONSUMPTION (BY GROUPS), 1928-29.

Group.	Total.	From U.K.	From U.S.A.
	$	$	$
Agricultural and vegetable products ..	233,130,244	53,670,561	103,690,332
Animals and animal products	71,661,754	5,664,451	42,654,255
Fibres and textile products	206,444,044	77,021,060	81,889,787
Wood, wood products, and paper ..	59,214,818	4,935,029	50,564,294
Iron and its products	346,610,939	18,997,316	317,089,125
Non-ferrous metals and their products	75,438,431	6,653,832	62,104,988
Non-metallic minerals and their products	166,964,231	12,100,661	135,154,049
Chemicals and allied products	37,723,046	4,942,879	26,223,786
Miscellaneous commodities	68,491,584	10,034,784	48,685,281
Total imports	1,265,679,081	194,020,573	868,055,897

An analysis of trade statistics indicates that about one-third of Canada's total imports are for use in the various industries of the Dominion. The table below gives the quantity and value of imports of commodities for the chief industries in 1928-29.

IMPORTS FOR CANADIAN INDUSTRY.

Commodity	Total Imports, 1928-29.	
	Quantity.	Value.
		$
Automobile parts	——	55,761,414
Crude petroleum (except for ship's stores), galls.	920,651,440	37,660,074
Raw cotton, lbs.	138,734,792	28,204,281
Sugar for refining, lbs.	853,743,600	26,405,199
Bituminous coal, tons	13,224,564	25,903,628
Raw rubber, lbs.	77,704,034	17,410,004
Raw furs	——	14,069,793
Raw hides, lbs.	50,777,300	12,429,221
Lumber, rough sawn, m. ft.	267,765	12,323,673
Automobile engines, No.	118,817	11,727,816
Tinplate, lbs.	161,896,900	8,008,574
Copper bars and rods, lbs.	44,414,100	7,040,012
Raw tobacco, lbs.	18,726,618	6,766,285
Raw silk, lbs.	1,279,849	6,533,088
Leather, unmanufactured	——	6,009,148
Raw coffee, lbs.	25,126,041	5,856,317
Skelp iron for pipe, lbs.	315,991,000	5,826,685
Wool tops, lbs.	8,745,627	5,823,174
Raw wool, lbs.	14,021,917	5,790,470
Manila and sisal grass, lbs.	74,583,100	5,766,251
Woollen yarn, lbs.	5,111,837	5,733,444
Iron ore, tons	2,272,130	4,391,269
Iron and steel articles for agricultural implements	——	4,321,694
Cotton yarn, lbs.	5,490,913	4,191,555
Alumina, bauxite, and cryolite, lbs.	344,791,100	4,103,626
Dyeing and tanning materials, lbs.	50,563,274	3,981,720
Silk cloth to be dyed	——	3,965,131
Gums and resins, lbs.	43,159,830	3,348,543
Rolled iron or steel for agricultural implements, cwts.	1,346,376	3,211,794
Pigs, ingots, and blooms (iron), cwts.	2,067,795	3,143,014
Tin in blocks, lbs.	5,892,800	2,987,502
Sulphur, lbs.	357,216,300	2,938,804
Crude cotton seed oil, lbs.	29,521,600	2,393,842
Oil for soap industry, galls.	3,241,587	2,384,627
Sausage casings	——	2,163,664
Artificial silk yarn and tops, lbs.	2,240,704	2,153,747
Raw cocoa, lbs.	15,801,300	1,942,164

SECTION III

INDIA

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THE STATESMAN

THE STATESMAN carries to-day, and has carried for many years, a far greater total volume of Advertising than any other newspaper (daily or weekly) in India or the East.

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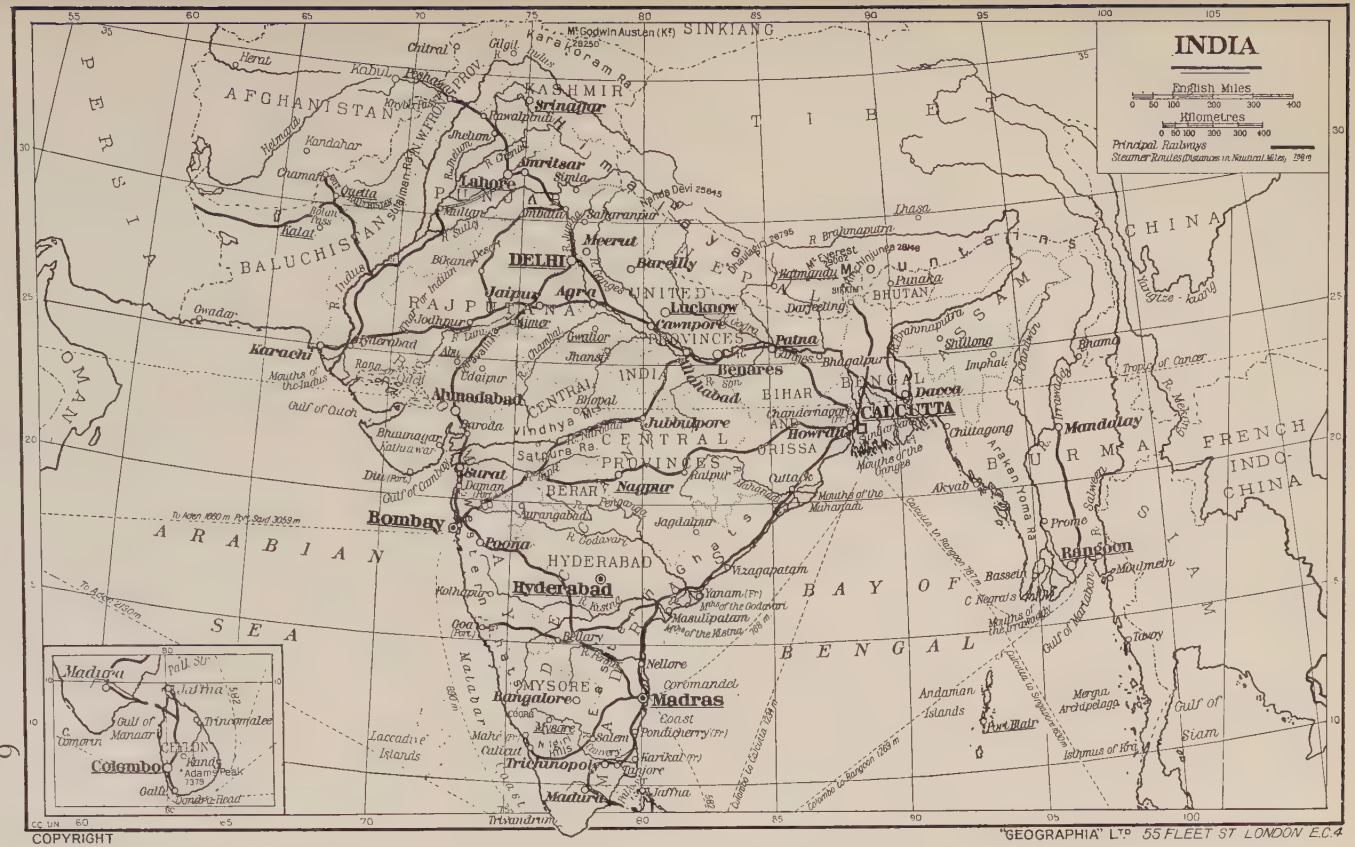
A typical Calcutta bazaar. The blend of East and West is seen in a small temple adjoining lofty business premises, and in a block of motor-omnibuses and motor-cars held up to permit the passage of bullock carts



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INDIA

CHAPTER I

In India, perhaps more than in any other Empire market, the method of marketing goods is of fundamental importance. Trade in certain lines is largely done through the medium of shipping houses; in others it is done direct. In some cases local agents are appointed; in others the manufacturer sends out his own special representative. The method adopted must be decided by the manufacturer or exporter himself, for no definite rule can be laid down. But one thing is essential to success. The market must be studied by a personal representative before any marketing campaign is organized.

This vital preliminary cannot be over-emphasized, particularly in the case of hardware, hollow-ware, cutlery, agricultural implements, hosiery, boots and shoes, paint, brushes, perfumes, and all other goods which have a large sale in the bazaars. The market should then be tested over a period of some 18 months—long enough for two trips to be made either by a member of the firm or by a manufacturer's agent. After the market has been thoroughly tested and found to be suited to the product, choice must be made between appointing either representatives to carry only the line of goods to be sold, or agents carrying other complementary lines.

[Par of Exchange: 1 Rupee (Rs. 1) = 1s. 6d.; Rs. 1 lakh = Rs. 1,00,000.]

TEXTILES AND WEARING APPAREL

The market for textiles and wearing apparel is the most important in India for British manufacturers. The post-war period has, however, seen a great increase in competition from

both local and foreign products. Local production is confined almost entirely to cotton textiles. Despite the increased output, however, it still supplies but a very small proportion of the demand. The chief feature of post-war development is the great expansion of the up-country mill industry as compared with that of Bombay. There is no local competition in made-up goods.

Cotton Piece-goods.—The market for cotton piece-goods is mainly in cheap lines. The last six years have, however, seen a material increase in the prosperity of the country and its inhabitants, with the result that the demand for better-quality cloth of good design and colour has grown considerably. Each year some 300,000,000 Indians buy on an average some six yards of cotton cloth. Given a good monsoon and a good agricultural season, each may buy twice as much. It is therefore of great importance for the British exporter to keep in close touch with Indian conditions, and in this respect the weekly reports on weather and crops of the Indian Commercial Intelligence Department are invaluable.

Imports of grey piece-goods have shown a considerable increase, in which British goods shared; imports from Japan and China, however, show an even greater proportionate increase. The market for coloured, printed, and dyed piece-goods has expanded considerably in recent years: British products have obtained the greater part of the increased trade, but Japanese and Italian competition is steadily growing. In these lines it is of vital importance to the British manufacturer to keep his prices as low as possible.

In the market for fents, American products are rapidly making headway owing to the low prices quoted: in 1928-29 imports of fents from the United States totalled nearly 23,000,000 yards, as compared with 11,500,000 yards in 1926-27. In haberdashery and millinery, a trade worth Rs.1,37 lakhs in 1928-29, increasing competition is being experienced from Japan and Germany. British products still control the market for sewing cotton. The market for woollen piece-goods

is valuable, and British imports supply more than one-third of the trade.

Artificial Silk.—A trade worth detailed attention from British manufacturers is that in artificial silk yarn. Imports more than doubled from 1925-26 to 1926-27; and in 1928-29, imports reached a total weight of 7,608,000 lb., as compared with 5,776,000 lb. in 1926-27. This trade is mainly in the hands of Italian firms, which supplied some 64 per cent. of the imports in 1926-27. In 1928-29, however, it is interesting to note that British imports were valued at Rs.30,51,629, as compared with Rs.14,07,347 in 1926-27, while imports from Italy fell from Rs.64,15,052 to Rs.61,03,645. Artificial silk yarn is being used in increasing quantities in local industry, and demand should show an even greater expansion during the next few years. Careful attention to local requirements would undoubtedly result in a great increase in the demand for good quality British yarn as opposed to the cheaper Italian product. In the market for piece-goods of mixed cotton and artificial silk British products have a stronger position, but their share of the trade is falling in face of keen competition from Italy, Switzerland, Germany, and Austria.

Wearing Apparel.—The market for wearing apparel is of considerable importance; increasing competition is being experienced from Germany and France, while the United States, Japan, and Italy also have fair shares of the trade. Cheap cotton underwear for the poorer Indian has a good sale. In the winter months woollen underwear of light weight is in demand in the districts north of the Bombay-Calcutta line. A good market exists for drapery, uniforms, and gold and silver thread. Among the Indian and Anglo-Indian communities there is a growing demand for ready-made and second-hand clothing, grey flannels and sports clothes. Flannels for tennis and cricket have a steady sale among Europeans and the richer Indians and Anglo-Indians. Sports equipment is largely produced in India. Brightly coloured silk cloth and underwear is required, particularly by the Parsee community, and

a fair market exists for silk hosiery. The market for artificial silk hosiery and underwear, both men's and women's, is steadily growing. Tussore silk for outer wear is in demand.

Cheap cotton-hose of bright colours and cheap felt hats have a ready sale among the Indians and Anglo-Indians. A market which should repay attention from British manufacturers is that for umbrella cloth. The majority of Indian workers buy an umbrella just before the break of the monsoon; these umbrellas are made in India, but the cloth is imported, largely from the Continent. The boot and shoe market is mainly for cheap lines, and there is a fairly large local output. A limited market exists for better quality imported goods. The import trade in boots and shoes has steadily increased during the last two years, particularly in boots and shoes of material other than leather. British products have a strong hold on this market.

CHAPTER II

Careful inquiries must be made before appointing selling agents in India. European agents, in general, are much better than Indian, and should always be granted the credit and commission terms common to the market.

Particular care must be taken that the agent appointed is not carrying divergent lines, for the full measure of success cannot be attained by such a representative. Samples should be sent out, and it will be found that it is far better to have a personal representative actually showing the goods to dealers than to send samples to dealers direct.

MACHINERY AND PLANT

THE steady growth of industry in India and developments in mining and transport have resulted in an increasing demand for all kinds of machinery. In 1921 there were 2,037 establishments engaged in the cotton industry; the metal industry had 983 establishments; mines numbered 1,035, including collieries, gold, iron, tin, and other mines. Since 1921 the number of industrial establishments has increased considerably, with a consequent growth in the demand for machinery and plant.

Total imports of machinery and millwork in 1928-29 were valued at Rs.18,36,00,000, an increase of Rs.4,73,00,000 compared with 1926-27, mainly owing to larger imports of prime movers, boilers, and textile machinery. British products have a firm hold on this market, some 80 per cent. of total imports in this class coming from the United Kingdom. Competition is keen from the United States in electrical plant, mining machinery, and machine tools, while American typewriters have a practical monopoly of that market. Strong competition is also experienced from Germany in cotton textile, small

rice mill, electrical, and oil crushing and refining machinery, and from Belgium in mining machinery.

The demand for oil engines is steadily increasing. A good market exists in Burma for tin, oil, and wolfram working machinery. Hydro-electric power schemes are being pushed forward in areas outside the large towns, and will result in an increased demand for electrical equipment and machinery. Competition from the United States has been particularly keen in turbo-generating sets, motors, and transformers, but the sales of British products are steadily growing. The increase in the number of cold-storage depôts and the growing use of refrigerated cars on the railways are reflected in the larger imports of refrigerating machinery. This market is one which will be of much greater importance in the future and merits close attention.

Openings for British Lines.—Sewing and knitting machines are in steady demand. Imports of typewriters are increasing, and an excellent market exists for British machines able to compete with American products. The demand in Bengal and other areas for oil crushing and refining machinery shows a rapid growth. A steady demand exists for tea, sugar, paper-mill, sawmill and wood-working, and rice and flour mill machinery. Irrigation projects, such as the Sutlej Valley Scheme and the Lloyd (Sukkur) barrage, provide openings for mechanical excavators, etc.

Railway Equipment.—The steady development in railway transport is of great importance to British manufacturers of railway machinery and equipment. During 1927-28 between 600 and 700 miles of railway line were laid down. The 1928-29 new construction programme included over 90 projects covering more than 2,600 miles of line. During 1927-28, imports of railway plant and rolling stock were valued at Rs.4,76,86,710. The British share of this trade showed a considerable increase compared with imports in 1926-27, some 80 per cent. of total imports being from the United Kingdom.

The remodelling and improvement of the State railway

workshops are causing a demand for equipment. A good demand exists for steel sleepers, pontoons, electrical cranes, and pumping plant, pile-drivers, water supply plant, lifting gear, stone-dressing plant, etc.

The policy of the Indian State Railways is to place orders in India whenever possible. This is a matter of considerable importance to British manufacturers. Agents must keep in close touch with Government Departments, and supply detailed reports on stocks to be carried in India. The advisability of establishing a branch factory in India is worthy of careful consideration.

CHAPTER III

In India the most valuable advertising medium is the Press. Daily and weekly newspapers can be divided into three main groups: English, Indian (printed in English), and vernacular. Of these groups the first is by far the most important. The English newspapers reach not only the European section of the population but also the educated Indian and Anglo-Indian. It must be remembered that out of the huge population of 320,000,000 *fewer than* 200,000 *are Europeans, and only some* 2,500,000 *can read and write English. These are, however, the chief buyers of Western goods. Although newspaper circulations are comparatively small, the reader value is considerably increased by the "chummery system" of Europeans—i.e., three or four men, or two families, share the same bungalow, and, consequently, the same newspaper. The club life of the British community also adds to the reader value of newspapers.*

Indian newspapers printed in English have a reader public who do not let their political opinions interfere unduly with their demand for Western products which do not compete with home-produced articles. The vernacular Press is of value as an advertising medium for lines which appeal to the Indian.

MOTOR VEHICLES

The growing prosperity of India is clearly reflected in the great increase in the demand for motor vehicles. Schemes for the construction of better roads are being actively pressed, and the Government of India is giving these schemes its favourable consideration. The market for light cars is rapidly expanding, and here British manufacturers have great opportunities for increasing their trade. The reduction in 1927 of the import

duty on motor-cars from 30 per cent. to 20 per cent. *ad valorem* has had a very favourable influence on demand.

During 1928-29 imports of motor-cars (including taxis) numbered 19,567, valued at Rs.4,21,46,946. This compares with 15,112, valued at Rs.3,53,91,906, in 1927-28, 13,197 in 1926-27, 12,757 in 1925-26, and only 4,323 in 1922-23. A very satisfactory feature of the returns is the growth in imports from the United Kingdom. In 1923-24 the United Kingdom's share was only 1,005 cars out of a total of 7,984; in 1928-29 British manufacturers supplied 3,645 out of 19,567.

The number of motor vehicles registered on March 31, 1929, was 172,680. This total included 116,625 motor-cars (including taxis); 30,181 lorries, buses, etc.; and 25,874 motor cycles.

American and Canadian Competition.—Competition is mainly from the United States and Canada. Imports from Canada increased from a total of 4,476 in 1926-27 to 6,568 in 1928-29. American imports increased from 4,030 to 7,943 in the same period. The total value of British imports in 1928-29 was Rs.97,54,256, as compared with Rs.1,07,90,597 from Canada, and Rs.1,81,06,829 from the United States.

Efficient marketing methods are of the first importance. The leading American and Canadian manufacturers are pushing the sales of their cars by means of extensive publicity campaigns and very active marketing. There is a marked desire for cars of British manufacture, but an active and extensive publicity campaign is vital before sales can be effected. Efficient distributors must be appointed throughout the country, not only in Calcutta and Bombay, but also in Madras and other centres. These distributors should receive an adequate commission on sales, one equal to that allowed by the manufacturers of competing makes. Service to purchasers is very necessary, and a supply of spare parts should be stocked at all the principal centres.

Commercial Vehicles.—The demand for commercial vehicles, both for passengers and goods, is rapidly growing.

Motor omnibus services are extending in the large towns, and many are already working in the country districts. Mechanical transport by lorry and van is being increasingly used in the ports and in up-country areas. Imports of motor omnibuses, vans, and lorries totalled 12,790 in 1928-29, compared with 8,682 in 1927-28, 6,343 in 1926-27, and 4,840 in 1925-26.

The British share of this trade is, however, very disappointing. British makes have a good hold on the business in heavy bus chassis and trucks, but the cheaper and lighter American and Canadian makes control the rest of the market. During 1928-29 imports from the United Kingdom totalled 473, compared with 447 in the preceding year; but imports from America numbered 5,809, compared with 3,699, and from Canada 6,373, against 4,268. A close study of the possibilities in India for motor transport would result in a great expansion of British trade.

Motor cycles.—A more satisfactory picture is presented by the motor-cycle trade, for here British makes control the market. In 1928-29, out of total imports of motor cycles and scooters numbering 1,802 the share of the United Kingdom was 1,611; in the preceding year the British share was 1,964 out of a total of 2,146. Competition is mainly from the United States. The market is steadily growing. The reduction in the import duty from 30 per cent. to 20 per cent. *ad valorem* has had a favourable influence on demand.

Accessories.—The importance of the market for accessories such as rubber tyres and tubes should not be overlooked. The number of pneumatic covers imported in 1928-29 was 462,737, valued at Rs.183 lakhs, compared with 418,808, valued at Rs.169 lakhs, in 1927-28. Competition from American and Canadian products is rapidly increasing. Compared with the preceding year, the British share of the trade showed a slight increase in value. Greater activity on the part of British manufacturers is essential if they are to retain their share of the market. The figures of imports of solid

rubber tyres and of tyres for motor cycles show that the United States is obtaining a greater share of the market.

Growing Market. — British manufacturers of motor vehicles will be well repaid for their attention to the Indian market. It has wonderful potentialities, the trend in demand being clearly indicated by the great increase during recent years in the imports of both passenger and commercial vehicles. The demand for passenger cars is rapidly expanding, while progress in road construction and developments in the use of motor transport are resulting in an ever-growing need for commercial vehicles of all kinds.

CHAPTER IV

The manufacturer must not be content simply with appointing suitable agents. Stocks must be accumulated at the distribution centres decided upon, and careful note taken of all factors affecting demand. The native consumer is almost entirely dependent upon agriculture, and a good or bad monsoon, or a rise or fall in prices for cotton, tea, and other staple products, vitally affects purchasing power. Crop prospects are as important from a practical point of view to the British exporter as they are to those directly concerned with the crop itself. This is clearly shown by the fall in imports during 1926-27 *as compared with* 1925-26, *that fall being a direct consequence of the slump in cotton prices and a lower oversea demand for certain other staple products.*

ELECTRICAL EQUIPMENT

In the market for electrical machinery and appliances, the products of British manufacturers hold the leading position. This market, however, is rapidly changing. Competition is steadily increasing, and if British products are to retain their position closer attention must be paid to methods of selling, particularly in the smaller lines. In the electrical machinery section, the branches and agencies of the chief British electrical firms give excellent service. But the bazaar trade has either largely been ignored or left in the hands of Indian salesmen. The capital of each Province has its electrical bazaar, comprising hundreds of dealers, where householders and small building contractors make their purchases; it is here that the cheap Continental articles are capturing the market.

Use of Electric Power.—The use of electric power in transport, industry, and the home is rapidly growing. In railway transport the Bombay local section of the Great Indian

Peninsular Railway has been electrified, and is now in operation; in Calcutta a scheme has been prepared for the electrification of the local lines, and an electrification scheme for Madras is being investigated. Dock developments in Karachi and other ports will certainly result in an increased demand for electric power, with a consequent increase in the demand for electrical machinery and appliances. The Bombay, Calcutta, and Madras Presidencies are the chief areas in which electrification schemes are being extended, while in Rangoon a good market exists for electrical appliances.

In the Madras Presidency and the United Provinces large schemes which will entail heavy demands for electrical plant and equipment are in operation. The Mettur-Cauvery irrigation scheme will be used not only for irrigation purposes, but also for the supply of hydro-electric power. Other irrigation projects, such as the the Sukkur Barrage, will result in increased facilities for the supply of hydro-electric power, and a consequent increase in the demand for electrical machinery and equipment. Areas supplied with electrical power are steadily increasing in size, many up-country stations now having their own electric supply companies. In Calcutta the demand for electric power has increased to such an extent that a new sub-station has been constructed and high-tension cables extended. In Bombay a scheme for the provision of further supplies of hydro-electric power, sufficient for the whole of the city and its environs, will shortly be in operation.

Fans, Switches, etc.—The majority of the large cities are electrified, and offer a big scope for fans, switches, meters, and wiring. This market is purely a price market, where the cheap article is always in demand. While the future gives almost unlimited scope in this field, it will always be a price market, even in the case of tenders called for by Government and other public bodies. It is in this field that it is essential for the European salesman to go into the bazaar.

A good demand exists for fans and parts. The market for electric wires and cables is largely in British hands, but German firms are making special efforts to secure a footing.

British products still hold the field in telegraph and telephone apparatus and appliances, but foreign competition is steadily increasing.

The market for carbons and accumulators and spare parts is almost exclusively British. In electric light accessories, fittings, and switches, British goods again hold the field, but increased competition is being experienced from the cheaper foreign lines. In the market for electrical machinery, such as generators, motors, and transformers, British products are mostly sold; this market is deserving of close attention.

Household Devices.—Small refrigerating and cold storage sets are now appearing in India, and there is certain to be a large business in small sets of this description when they become better known and cheaper in price. Other electric household aids, such as irons, coffee percolators, toasters, ranges, kettles, etc., are increasing in demand.

With the exception of the bazaar trade, all business may be said to be secured personally. A great deal of it is transacted in the clubs. In the big lines it is absolutely essential to have a man on the spot. It is also advisable to remember that for Government orders it is becoming more and more the practice for tenders to be in rupees instead of in pounds sterling.

CHAPTER V

An important factor in selling goods in India is the method of appeal to the buyer. Some lines have a sale with all classes; others sell only to the poorer Indian and Anglo-Indian; and others to the European and the richer Indian. All appeals to the buyer must cover the ground thoroughly.

Information must be given on the special qualities of the goods, their suitability to the market, prices, etc.; if the appeal is to the manufacturer, c.i.f. prices should be quoted when possible. British products cannot sell solely on the reputation enjoyed by British goods in general. Selling policies must be changed to suit changing conditions, for business will only expand when careful attention is devoted to the market. Selling campaigns should be spread over the whole year, with special attention to seasons such as the cool weather and the Indian festival seasons.

HARDWARE AND CUTLERY

The market for hardware and cutlery can be divided into two distinct sections. The first covers demand by the European stores, Government Departments, other public bodies, railways, and industry. For this section quality is of primary importance. The second is the bazaar trade, which is essentially a price market. Cheapness, and not quality, is the vital factor in sales. It must not be concluded from this that quality goods have no prospects of sale in the bazaar trade. The growing wealth of the country is reflected in the increased prosperity of many of the inhabitants, and goods which before the war had a very limited sale are now greatly in demand in the bazaars. An example of this is the demand for hurricane and other lamps for illumination purposes, in

place of the small pot of oil and a wick which was once in universal use throughout the country.

Items in Hardware Trade Returns.—The heading of "Hardware" in the trade returns of India covers many items, including agricultural implements, buckets of tinned or galvanized iron, builders' hardware, domestic hardware, enamelled ironware, gas mantles, tools for engineers, carpenters, blacksmiths, tinmen, etc., metal and glass lamps, pipes, tubes, metal safes and strong-boxes, wire netting, and stores. It may also be extended to include paints, oils, varnish, grease, blacking, cement, and other lines in general demand in constructional work. The market for these lines has an annual value exceeding £3,750,000. During 1926-27 demand fell, but a distinct revival has since been shown. The outlook for British goods is particularly bright.

Rather too much stress has been laid recently upon the fall in British imports and the competition from Germany, Austria, Sweden, the United States, and Japan. It must be remembered that Germany has always had a large share of the market; she is also a large purchaser of Indian products, and consequently provides facilities for Indo-German trade. But it cannot be denied that in the cheaper lines British manufacturers have largely been ousted by the foreigner. Total imports of hardware rose from a value of Rs.3,17,00,000 in 1913 to Rs.5,23,00,000 in 1928-29, but imports from the United Kingdom fell from 57 per cent. to 36 per cent. of the total, while those from Germany rose from 18 to 32 per cent.

Competition from Germany, Austria, and Japan is mainly in price, but competition from the United States is largely in design and suitability for the market. The figures for the years ended March 31, 1927, 1928, and 1929 show that, while the United Kingdom is maintaining her share of the trade, imports of hardware from Germany are steadily increasing, while imports from the United States are declining.

Cutlery.—In the cutlery trade the United Kingdom has a practical monopoly in the market for pruning knives, but

Germany dominates the markets for cheaper grades. The tariff levied on imports of hardware and cutlery must be taken into consideration, particularly as the bazaar market is, as stated above, largely a price market. The following table shows the rates levied under the revised tariff according to the Government of India Notification No. 73T (50) issued on December 24, 1927, with effect from January 1, 1928:

Names of Articles.	*Duty.*
Agricultural implements	Free
Cutlery (not plated)	15 per cent. *ad valorem*
Cutlery (plated)	30 ,, ,, ,, ,,
Iron or steel nails, rivets, washers, bolts, nuts (except nails, wire or French)	10 ,, ,, ,, ,,
Hardware, ironmongery and tools, all sorts not otherwise specified	15 ,, ,, ,, ,,
Building materials, including, asphalt, bricks, cement (other than Portland cement), tiles, etc.	15 ,, ,, ,, ,,

Market Openings.—A steady demand exists for all lines. Markets for certain articles are rapidly growing, while good openings exist for articles to suit particular needs. In enamelled hollow-ware, competition is mainly in cheap lines from Japan; it is advisable that British goods of this kind should be branded. The market for hurricane and other lamps, both oil and petrol pressure, is rapidly growing, competition being almost entirely from the United States. Cash boxes, black japanned safes, files, bolts and nuts are in steady demand. Local competition is important in certain lines, such as cast brass materials, bolts, nuts, etc., but local firms have not enough capital to take up a large contract; also, owing to bad factory organization, they often fail through getting overstocked in unwanted lines.

The market for sewing machines has shown a great increase in recent years. Every village has its tailor and every tailor

desires to own a sewing machine; as a consequence sales are rapidly growing. Thermos flasks are in great demand, and a tiffin carrier on the thermos principle should have a large sale if the price is not too high; such carriers should be large enough to take rice, curry, and perhaps soup. A good market exists for paints, which must be able, if for use on metal, to withstand the expansion and contraction caused by the rapid changes in temperature.

Refrigerators.—Another market which shows even better prospects for the future is that in refrigerators. The ice refrigerator has a large sale; care must be taken that the wood used withstands the attacks of insects, teak or a similar wood being essential. The steady development of hydro-electric power resources in recent years, as well as the increasing use of electric current on the railways, has caused a great increase in the demand for electric refrigerators, but the market is largely in American hands. The area supplied with electric current is steadily growing, and schemes in hand and under consideration should very favourably affect this market. Another important line largely captured by the Americans is that of precision machine tools; British manufacturers have an excellent and growing field for such tools if they will only pay more attention to finish and packing.

Agricultural Implements.—The demand for agricultural implements has shown a steady increase in recent years and is deserving of more careful investigation than the majority of British manufacturers have given it. The Report of the Royal Commission on Agriculture (commonly known as the Linlithgow Commission) should be studied by all interested in the market for agricultural machinery.

The cutlery market has excellent openings for British goods, particularly if they can compete in the cheaper lines. In this market the British manufacturer has a well-deserved reputation for enterprise, as opposed to the somewhat conservative attitude of manufacturers of certain hardware lines, and should be able to get a larger share of the trade.

Marketing Points.—There are certain points in marketing which deserve very close attention. Adequate stocks must be maintained in centres of distribution, for it is the general practice of Government Departments not to buy articles which are not stocked in India. It is also found that if articles are not available when required for replacement purposes consumers, particularly poor people, are encouraged to avoid replacing a worn article until it is absolutely incapable of further use. Agents should always be able and willing to demonstrate the use of an article, particularly in the case of small tools.

Agents and representatives must be warned to keep their principals in touch with all details likely to affect the market. Anticipation of probable demand will often lead to important orders being placed. Careful note should be made of schemes for railway and road construction, irrigation schemes, etc., and even of extensions in the acreage planted under the various crops.

Government Orders.—The orders placed by Government and other public bodies, including railway authorities, are of very considerable importance. Many miles of railway line are under Government control, and the Government is largely interested in construction work of all kinds. The Indian Stores Department places contracts each week for various lines of hardware goods, particulars of which, together with contracts placed and goods wanted by railways, etc., are to be found in the *Indian Trade Journal,* issued weekly in Calcutta by the Department of Commercial Intelligence and Statistics.

It is very advisable for manufacturers to send, at definite intervals, special catalogues, circulars, etc. (which could be conveniently filed), to the office of the Indian Stores Department, other Government bodies, railways, and all public bodies throughout India, giving details of articles manufactured, prices, etc. These could be forwarded to the agent in India, who would thus act as the connecting link with the manufacturer in Great Britain.

India is a market peculiar to itself. It has its own methods of doing business and its own market psychology. Methods applicable to other markets do not apply in the case of India, and it is of vital importance when entering the market to consult men who know and understand the country. This applies to every phase of marketing, from the essential preliminary investigation to advertising and the final selling campaign.

CHAPTER VI

In exporting goods to India the method of packing must be carefully studied. Every precaution must be taken against damage from careless handling. If the goods are destined for up-country stations, packages should not be too large or too heavy for one man to carry. In the case of products likely to be adversely affected by extreme heat or humidity, reports should be obtained from India as to the most suitable method of packing. Small stocks, packed in various ways, should be sent to various areas, and returned to the exporter after a reasonable period, so that he can test the efficacy of each method. If products are packed in wooden or cardboard boxes, the danger of attacks by insects must be guarded against. It must be realized that except in the case of heavy articles, such as machinery, the method of packing employed in the home market is generally unsuited to India.

GROCERIES AND CONFECTIONERY

IMPORTS of provisions and confectionery more than doubled in value between 1922-23 and 1927-28. Total imports in 1927-28 were valued at Rs.6,40,60,141, compared with Rs.5,77,63,701 in the preceding year. The United Kingdom's share of the trade increased from Rs.225 to Rs.234 lakhs. In 1928-29, a small decrease was recorded, total imports being valued at Rs.6,21,24,467. The British share fell to Rs.225 lakhs. In regard to provisions of all kinds keen competition is experienced from the Netherlands, while the United States and other countries have a fair share of the trade. Competition from India itself is not of importance, although local production of tinned fruit and vegetables is increasing.

Tinned Foods.—There is a growing market for tinned meats and fish. Tinned asparagus, lobster, and other shellfish, salmon, etc., are in great demand among the European communities, and herrings in tomato sauce, sardines, etc., find a ready sale. Some 50 per cent. of the total imports of tinned fish is obtained from the United States, while Portugal has a fair share of the trade. British exporters have good openings in these lines. Tinned game, ham, sausages, tripe, and vegetables are in good demand.

Fresh Food.—The extension of cold storage facilities has resulted in a growing market for fresh meat and fish from oversea. Fresh imported meat is welcome because of its food value, which is much higher than that of Indian meat. Kippers and smoked haddock are bought by Europeans. Imports of dry unsalted fish from the United Kingdom are increasing; competition is chiefly from Japan.

An excellent demand exists for bacon and hams, the trade being almost entirely in British hands. Potted meats and fish paste find a good sale. Tinned and bottled fruits are wanted, imports increasing in value from Rs.9,65,211 in 1926-27 to Rs.11,50,104 in 1928-29. The United States is the principal source of supply, but the British share of the trade is capable of considerable expansion. Other canned and bottled provisions have a good market, competition being mainly from the Netherlands.

Cereals.—The demand for imported biscuits and cakes is growing rapidly, their value increasing from Rs.41,99,490 in 1925-26 to Rs.56,33,525 in 1928-29. The trade is controlled by British firms. Farinaceous and patent foods in bulk are imported in large quantities, and British manufacturers of patent foods have an expanding market. Milk foods for infants and invalids are wanted, imports increasing from a value of Rs.22,52,757 in 1925-26 to Rs.32,59,376 in 1928-29; the trade is almost entirely in British hands. In other sorts of farinaceous and patent foods the United Kingdom has some 50 per cent. of the trade, though competition from the United

States is increasing in intensity. British manufacturers of branded cereal lines have excellent openings in this market.

Other Lines.—Butter, including canned butter, is in request, Denmark being the chief source of supply. Imports of fresh and canned cheese, valued at some Rs.12 lakhs per annum, are obtained mainly from the Netherlands and the United Kingdom; openings also exist for wrapped cheese.

Sales of condensed and preserved milk are rapidly increasing, imports in 1928-29 being valued at Rs.89,02,713, compared with Rs.62,03,787 in 1925-26. The United Kingdom and the Netherlands are the chief sources of supply, but competition is met with from Australia, Italy, Denmark, and Norway. This market presents excellent opportunities for British firms. Dry mustard packed in tins, table salt, and baking and custard powders have a ready sale. Increased competition is being experienced in baking powder from the United States. Pickles and sauces have a good market, the United Kingdom being the principal source of supply. There is a demand for pickled walnuts, pickled onions, and bottled vinegar.

Jams and jellies have a steady sale, imports in 1928-29 being valued at Rs.7,71,087. British firms supply more than 50 per cent. of imports. Strong competition is met with from Australia in the cheaper lines packed in tins. There is an excellent market for good quality jam and marmalade in glass containers, 1 lb. and 2 lb. jars being preferred. Coffee and coffee extracts and substitutes have a sale.

Cocoa and Confectionery.—Cocoa has only a small market, but it would become more popular if given better publicity. Imports of cocoa and chocolate were valued at Rs.5,66,187 in 1928-29, an increase of Rs.1,65,000 compared with the preceding year. The United Kingdom and the Netherlands are the chief sources of supply, some competition being experienced from Switzerland. There is a rapidly growing inquiry for confectionery, which presents very good open-

ings for British lines. Demand is extending among the Indian and Anglo-Indian communities. Total imports in 1928-29 were valued at Rs.26,76,734, compared with Rs.24,84,719 in 1925-26. The trade is mainly in British hands, but competition from Switzerland and Japan is increasing.

CHAPTER VII

The expanding demand for Western products in India is due largely to the progress in education, particularly to the increasing use of the English language, and to the growing influence of the Press and other forms of advertising and the cinema. New and larger markets of the utmost value to the British manufacturer are thus being created, and the demand for quality products shows a steady increase. Foreign competition is, however, rapidly extending, and the closest attention to market requirements and marketing methods is essential if British producers are to obtain a satisfactory share of this new trade.

POTTERY, GLASS, AND GLASSWARE

The demand for imported earthenware, china, porcelain, sanitary-ware, tiles, cement, glass, and glassware attains considerable dimensions, the market presenting good openings for British products. In 1928-29 imports of earthenware and porcelain were valued at Rs.73,09,294, and of glass and glassware at Rs.2,37,49,480. Tiles of a value of Rs.20,56,651 and cement valued at Rs.67,78,012 were also imported during that year.

Although there is a fair sale for good quality tiles, and a small market for better quality china and glassware, exporters must appreciate that the market is mainly for low quality lines, particularly in household china, earthenware, and glassware. Breakages in transit and the carelessness of Indian servants do not encourage a demand for high-class ware. It must also be remembered that European residents, in general, do not remain for many years in the same station, and when they come home very little is realized by sales of household goods.

Marketing Methods.—Certain well-defined points in marketing methods must be observed if success is to be attained. A personal investigation of the possibilities of the market is a valuable preliminary to trading. If this is impossible a number of firms should combine for the purpose of sending out a reliable representative to report on openings and arrange for distribution. The choice of agents is of the greatest importance. English agents are generally superior to Indian. Good packing is very necessary, and in this respect the Japanese, who are very skilful packers, often have a decided advantage. Quotations should always be c.i.f., preferably the actual destination. A co-operative advertising campaign is of the utmost value.

Foreign competition is very keen in the majority of lines, and British manufacturers receive no preference in import duties. The most satisfactory market from the British point of view is that for earthenware, including sanitary-ware and pipes of earthenware, Belgian competition is, however, growing in pipes of earthenware.

Porcelain.—Japanese producers control the trade in porcelain, imports from that country having shown a large increase. This market, excluding electrical porcelain, has expanded greatly in recent years, the value of imports rising from Rs.24,00,237 in 1925-26 to Rs.34,86,921 in 1927-28. In 1928-29 a small decrease was recorded. German competition is also increasing. British lines have a fair share of the sales of electrical porcelain; this market should expand considerably as the electrical schemes now in progress are completed.

Tiles and Cement.—A close study of the requirements of the market would result in an increase of orders for British tiles. Some local competition is experienced in the cheaper lines. Building activity in the chief towns has resulted in an increased demand for cement, imports of Portland cement rising from a value of Rs.56,12,132 in 1926-27 to Rs.65,29,497 in 1928-29. This trade is almost entirely in British hands. Competition from cheap Continental cement is, however, a

factor to be taken into account. A good market exists for china clay.

Glass and Glassware.—Glass and glassware are imported largely from foreign sources, the British share in 1928-29 being valued at Rs.20,72,562 out of a total of Rs.2,37,49,480. Japan, Czechoslovakia, Germany, and Belgium are the chief suppliers. There is a good sale for glass bangles, beads, and false pearls, but orders go almost entirely to Czechoslovakian, Japanese, and German firms. Sheet and plate glass is in steady demand, and provides an expanding market. Belgian products control the trade in cheap window glass, but British products have a good share of the better quality lines; the closest attention is, however, essential if that share is to be retained.

Openings exist in the expanding market for funnels, globes, and glass parts of lamps. German products have some 50 per cent. of the orders, with American and Japanese lines as the chief competitors. There is an excellent market for bottles and phials. Soda-water bottles are largely obtained from the United Kingdom. Other bottles are chiefly obtained from Germany and Japan, but careful attention to requirements should result in British manufacturers recovering lost ground.

A fairly good opening exists for tableware (including decanters and tumblers), imports in 1928-29 being valued at Rs.10,93,853. Low price is the vital factor. Cut-glass tableware has a very small sale. Scientific glassware is obtained mainly from Germany, the British share being poor. The demand for other glassware is good. Japan and Germany are the chief sources of supply, although Great Britain sends more than formerly.

CHAPTER VIII

The post-war record of India is one of steady development, her progress being clearly reflected in oversea trade returns. The Indian market is of growing importance to British exporters, and it is satisfactory to note that they are sharing in the increased trade. Close attention to market requirements and the activities of competitors would result in still more business.

PAPER AND STATIONERY

Developments in the industry and trade of India, and the progress made in education, have resulted in a growing market for paper, pasteboard, and stationery. The value of this market to the British manufacturer of these products has not been fully appreciated. Foreign competition has increased, and foreign firms have obtained a larger share of the trade. In 1913-14 the United Kingdom supplied more than 50 per cent. of the total imports of paper and pasteboard, but by 1926-27 this share had fallen to 35·5 per cent. Returns for 1927-28 and 1928-29 were slightly more satisfactory, the British share rising slightly. An increase was also shown in the imports of stationery from the United Kingdom. Greater activity in marketing would result in a further increase in the demand for British products. Good representation is essential to success.

Countries whose share of the trade in paper and pasteboard has increased during the post-war period are Norway, Sweden, the Netherlands, the United States, and Japan. Total imports in 1928-29 were valued at Rs.330 lakhs, compared with Rs.301 lakhs in the preceding year. The trade in newsprint is mainly in the hands of Norwegian firms. The British share is small.

Packing Paper.—Imports of other printing paper increased in 1928-29, as compared with the preceding year: the United Kingdom has a good share of this trade. Competition from Continental sources is very keen. Local production is confined to cheap, coarse packing paper. The trade in packing paper is mainly controlled by Scandinavian firms. This market is worthy of close attention and presents good openings for British firms.

Boards.—There is a growing demand for pasteboard, millboard, and cardboard, presenting opportunities to British exporters. Imports of strawboards increased in value from Rs.12,62,811 in 1926-27 to Rs.14,84,831 in 1927-28, but fell to Rs.13,00,673 in 1928-29. The British share of this trade is negligible. The market is largely controlled by the Netherlands, but Japanese competition is increasing in importance. The United Kingdom has some 40 per cent. of the trade in other kinds of pasteboard, millboard, and cardboard, total imports of which were valued at Rs.18,78,142 in 1928-29, as compared with Rs.12,38,427 in 1927-28. Competition is chiefly from Germany and Sweden.

Government Purchases.—The Government of India is a very large purchaser of paper, pasteboard, and stationery. Some 75 per cent. of the paper and pasteboard, and practically all the stationery, are obtained from the United Kingdom. British manufacturers should keep in very close touch with the Department making these purchases.

Writing Paper.—Writing paper and envelopes, pencils, and all other sorts of stationery have an excellent market, the value of which will steadily extend as business in India itself expands and as the percentage of literates among the Indian people increases. British firms have a very strong hold on the trade. Imports of writing paper and envelopes increased in value from Rs.58,59,144 in 1926-27 to Rs.63,46,480 in 1928-29, the British share of the trade in the latter year being valued at approximately Rs.32,00,000. Writing paper in large sheets is in strong demand; competition is chiefly from

Norway. The United Kingdom supplies nearly all the notepaper and letter paper and envelopes imported, and also the envelopes imported separately. Continental competition in the cheap lower grades of writing paper and envelopes is very keen and merits close attention.

Stationery.—The trade in stationery is largely a bazaar trade. The European stores, although the lines are dearer, do a good trade, partly because the purchaser can be certain of the cleanliness of the goods so obtained. It must be appreciated that the consumers of stationery are largely Indians, and brightly coloured, good quality notepaper and envelopes are consequently in demand; the better-class Indian prefers crested notepaper, and likes to have his initials on the paper.

The demand for better quality office stationery—a trade mainly in British hands—by the Indian business houses shows a steady expansion. The British share of the trade in pencils is capable of growth, both Germany and Japan having a larger share of the trade than the United Kingdom. British imports of other sorts of stationery were valued at Rs.51,12,963 in 1927-28, an increase of nearly Rs.8 lakhs on the preceding year. German trade, valued at Rs.18,64,037, showed a decrease, but imports from Japan and the United States expanded. Total imports of other sorts of stationery in 1928-29 were valued at Rs.91,21,246, compared with Rs.83,74,597 in 1927-28.

German and Japanese competition is very keen in the cheap bazaar trade. American competition is largely confined to better quality pencils and pens; there is a growing demand among the Indians for these lines, brightly coloured pencils and fountain-pens finding a very receptive market. Service in repairs and spare nibs is essential.

INDIA

MARKET DATA

Area and Population.—India has an area of 1,805,332 square miles. In 1921 the total population was 318,942,480: in 1926 the population of British India, according to Public Health Department registration statistics, was 241,471,383, as compared with 241,419,723 in 1921. The population is mainly rural, only approximately one-tenth being classed as urban. The following table gives areas and populations according to provinces.

Province.	*Area in Sq. Miles.*	*Population, 1921.*		
		Urban.	*Rural.*	*Total.*
Ajmer-Merwara ..	2,711	164,697	330,574	495,271
Andamans and Nicobar Islands	3,143	—	27,086	27,086
Assam	53,015	178,145	7,428,085	7,606,230
Baluchistan	54,228	69,945	350,700	420,648
Bengal	76,843	3,186,300	43,509,236	46,695,536
Bihar and Orissa ..	83,161	1,374,765	32,627,424	34,002,189
Bombay Presidency* ..	123,621	4,440,248	14,907,971	19,348,219
Burma	233,707	1,291,527	11,920,665	13,212,192
Central Provinces and Berar	98,876	1,383,267	12,519,493	13,912,760
Coorg	1,582	8,841	154,997	163,838
Delhi	593	304,420	183,768	488,188
Madras	142,260	5,278,705	37,040,280	42,318,985
North-West Frontier ..	13,419	335,849	1,915,491	2,251,340
Punjab	99,846	2,212,191	18,472,833	20,685,024
United Provinces of Agra and Oudh ..	106,295	4,805,465	40,570,332	45,375,787
Total, provinces ..	1,094,300	25,044,368	221,958,925	247,003,293
States and agencies	711,032	7,430,908	64,508,279	71,939,187
Total, India ..	1,805,332	32,475,276	286,467,204	318,942,480

* Including Aden.

The chief towns, and their populations in 1921, are:

Town.	*Population.*	*Town.*	*Population.*
Calcutta and Hourah ..	1,327,547	Lahore	281,781
Bombay	1,175,914	Ahmedabad	274,007
Madras	526,911	Lucknow	240,566
Hyderabad	404,187	Bangalore	237,496
Rangoon	341,962	Karachi	216,883
Delhi	304,420	Cawnpore	216,436

According to the 1921 census, of the total population 216,734,586 were Hindu, 3,238,803 Sikh, 68,735,233 Musalman, 11,571,268 Buddhist, and 4,754,064 Christian: the remainder were Jew, Jain, etc. The census showed that only 22,600,000 of these were literate—*i.e.*, able to write a letter in their own vernacular: 2,500,000 were returned as able to read and write English. The total European population returned as British subjects was 176,031.

Production.—Only a small percentage of the population is engaged in industry. According to the census of 1921, the total number of factories was 15,606, employing 2,681,125 persons, of whom 1,994,314 were males and 686,811 females. The following table summarises the census returns on industry.

Description of Industry.	*No. of Establishments.*	*Total of Persons Employed.*	
		Males.	*Females.*
Growing of special products (*i.e.*, coffee, rubber, tea, etc., plantations)	2,266	435,015	385,853
Mining (including collieries, gold, iron, etc., mines)	1,035	196,987	9,756
Quarrying	264	20,548	6,686
Textiles:			
Cotton	2,037	334,719	99,177
Jute, hemp, etc.	484	258,636	51,875
Wool	88	9,652	887
Silk	174	8,428	995
Others	106	4,584	4,112
Leather	243	13,405	1,090
Wood, etc.	448	31,543	1,323
Metal (including iron and steel works, engineering, iron foundries, etc.) ..	983	160,354	9,339
Glass and earthenware	1,085	65,927	16,093
Chemical (including oil, paper, perfumes, salt, dyes, soap, etc.)	1,226	95,894	13,263

Description of Industry.	No. of Establishments.	Total of Persons Employed.	
		Males.	Females.
Food (including dairy farms, breweries, flour and rice mills, sugar factories, etc.)	2,607	93,653	16,215
Dress (including boot and shoe, hosiery, etc.)	407	11,677	341
Furniture	157	6,618	52
Building	417	22,693	7,605
Construction (including shipyards, railway, port, motor-car, bicycles, etc.) ..	471	153,312	1,971
Gas, electric, hydro-electric, and ice ..	150	14,783	473
Trades (including bookbinding, printing, jewellery, etc.)	958	55,886	305

Overseas Trade.—The following table enables a comparison to be made between the pre-war trade of British India and the trade in 1927-28 and 1928-29.

VALUE OF TOTAL FOREIGN SEA-BORNE TRADE.

	Average, 1909-10 to 1913-14.	1927-28.	1928-29.
Imports.	Rs. lakhs.*	Rs. lakhs.*	Rs. lakhs.*
Private merchandise	1,45,85	2,49,84	2,53,31
Government stores	5,82	11,69	10,09
Total merchandise	1,51,67	2,61,05	2,63,40
Total treasure	47,20	34,90	37,29
Total imports	1,98,87	2,96,43	3,00,69
Exports.			
Private merchandise:			
Indian produce	2,19,50	3,19,15	3,30,13
Re-exports	4,62	9,54	7,83
Government stores	11	1,57	1,19
Total merchandise ..	2,24,23	3,30,26	3,39,15
Total treasure	8,32	3,14	6,35
Total exports ..	2,32,55	3,33,40	3,45,50

* 1 lakh = Rs. 1,00,000 = £7,500.

The table below shows the value of imports of private merchandise according to classes for the years 1927-28 and 1928-29, in thousands of rupees.

Class.	1927-28.	1928-29.
	Rs.1,000	Rs.1,000
Food, drink, and tobacco	37,21,50	46,08,49
Raw materials and articles mainly unmanufactured	25,58,46	22,51,98
Apparel	2,31,43	2,51,11
Arms, ammunition, etc.	70,65	76,64
Chemicals, drugs, etc.	5,02,65	4,91,50
Cutlery, hardware, implements, and instruments	7,63,11	7,76,93
Dyes and colours	4,32,17	4,36,54
Electrical equipment (not machinery)	2,83,49	3,12,95
Wood and timber manufactures	47,35	60,68
Glassware and earthenware	3,29,89	3,11,23
Hides, leather, etc	64,29	63,99
Machinery	16,99,49	19,43,24
Iron and steel and manufactures thereof	21,42,93	20,23,50
Other metals and manufactures thereof	6,96,08	6,73,61
Paper and stationery	3,92,29	4,31,55
Railway plant and rolling stock	4,76,87	—*
Rubber manufactures	2,70,80	2,85,86
Vehicles	7,69,37	11,00,60
Cotton yarns and manufactures	65,15,68	63,24,37
Jute yarns and manufactures	24,08	26,53
Silk yarns and manufactures	3,60,38	3,77,07
Woollen yarns and manufactures	4,91,87	4,52,34
Other yarns and textile fabrics	7,15,99	6,50,63
Miscellaneous	9,83,37	9,59,52
Total	1,82,64,23	1,80,32,39

* Discontinued as a separate item.

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NEW ZEALAND

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NEW ZEALAND

CHAPTER I

New Zealand has definitely emerged from the slight depression which was experienced during 1926. *The economic position is thoroughly sound, the national financial position is favourable, primary and secondary production are progressing, and trade is good. Low prices ruling for pastoral products in* 1926 *adversely affected the value of exports, with the result that the favourable visible trade balance of* £2,805,865 *in* 1925 *was followed by an unfavourable balance of* £4,613,988 *in* 1926.

During 1927, *however, trading conditions improved, a favourable balance of* £3,713,408 *being recorded. Returns for the year showed exports at* £48,496,354 *in value, over* £4,000,000 *more than in* 1926; *imports at* £44,782,946 *were some* £5,000,000 *less than in* 1926. *The year* 1928 *was even more satisfactory. Exports reached a total value of* £56,188,481, *and imports were worth* £44,886,266. *The favourable visible balance of trade was* £11,302,215. *The improvement in export trade has resulted in an improved consumer demand, and detailed investigation of the market by manufacturers and exporters would materially improve the inquiry for British goods.*

TEXTILES AND WEARING APPAREL

One of the most important markets in New Zealand is that for soft goods. In the calendar year 1928 the value of apparel and ready-made clothing imported was £2,156,520; of cotton piece-goods, £1,922,979; of silk, satin, velvet, etc., piece-goods, £1,001,952; of boots, shoes, and slippers, £1,049,408;

of woollen piece-goods, £785,528; of drapery, n.e.i., £507,878; of carpeting, matting, and oilcloth, £574,942; of hosiery, £519,141; of millinery, £133,190; of haberdashery, £86,211. This trade is largely in British hands, but competition is experienced in silks from Japan, in haberdashery from the United States, France, and Germany, in low-count cotton piece-goods from Japan, and in the cheaper lines of made-up goods from Australia.

Local Industry.—Local competition is almost entirely confined to pure woollen goods. There are some 12 woollen mills in New Zealand, manufacturing wool into materials for rugs, blankets, woollen cloth, patterned tweeds and worsteds, the finer cloths for ladies' costumes, and ladies' and children's underwear. A New Zealand woollen mill in its various departments undertakes the whole of the operations, from the fleece to the cloth, worsted, tweed, serge, or other fabric ready for use. New Zealand rugs, particularly Petone and Mosgiel, have a worldwide reputation.

Tariff Preference.—The provisions in the 1927 tariff relating to soft goods are of great importance to British manufacturers. The outstanding feature is the increased measure of preference accorded to many lines of British origin, the margin of preference being increased from 15 per cent. *ad valorem*, to 20 per cent. *ad valorem* in drapery, woollen yarns, and piece-goods, hosiery, apparel, millinery, and hats and caps.

All textile piece-goods of cotton, linen, jute, hemp, other vegetable fibres, silk, imitation silk, artificial silk, or of combinations of these materials with one another, or with any other material except wool or hair, are admitted free under the British Preferential Tariff; similar goods of foreign origin are subject to a duty of 15 per cent. *ad valorem*. Duties on certain other soft goods of British origin are 25 per cent. *ad valorem* (apparel, ready-made clothing, hosiery, and millinery), and 20 per cent. *ad valorem* (haberdashery, woollen piece-goods, lace, and rugs).

Apparel.—Lines in demand include all kinds of women's coats, ladies' underwear, all classes of dress goods, all classes of men's wear, such as soft collars, socks, pyjamas, and hats, and material used for making suits and overcoats. Out-sizes are in more request than in the British market, as the inhabitants of New Zealand are generally bigger than those of the United Kingdom. Real silk goods have an excellent market, but are gradually being ousted by artificial silk goods. It appears very probable that within a few years nine-tenths of the trade in underwear for both men and women will be in artificial silk, and British manufacturers of such goods should pay careful attention to this trend in demand.

Outside woollens, the markets for textiles and other soft goods are dependent entirely upon imports. It is important for British manufacturers to realize that the situation in England governs the market in New Zealand. No distinctive home standard (unless it is quality) governs demand in New Zealand, and if goods are selling well in the United Kingdom they will sell well in New Zealand, given a well-conducted marketing campaign. Personal representation and branding are vital to success. The bulk of the buying is done by London buying houses.

CHAPTER II

In New Zealand the degree of sentiment in favour of British goods is of the greatest value to British trade. Home competition in manufactured articles is not so keen as in other Dominions, and a substantial tariff preference is granted to imports of British origin. It is consequently all the more important for the purchaser to know which goods are of British manufacture. Brands are essential to successful selling in many lines, and all lines must be brought direct to the notice of the consumer by well-organized publicity. Press advertising must be the basis of all publicity campaigns, for the New Zealander is a careful reader of daily and weekly newspapers.

MACHINERY AND PLANT

A MARKET of the greatest value to British trade with New Zealand is that for metals, metal manufactures, and machinery. Local production of manufactured goods has not reached an advanced stage, development being handicapped by the isolated geographical position of the Dominion, the smallness of the home market, and high rates of wages. The gross value of factory production, including animal food industries, exceeded £83,000,000 in 1926-27, the value added by process of manufacture being about £33,000,000.

Local Secondary Industry.—The total number of factories has increased from 4,357 in 1920 to 5,088 in 1927. The woollen, apparel, footwear, chemical, general engineering, motor engineering, motor-body building, and agricultural implement industries are of growing importance. A certain measure of tariff protection has been afforded to local manufacturers, particularly to motor-body builders. A demand exists for increased protection, but primary producers are

opposed to this policy. The progress of the country's secondary industries has resulted in an increased demand for machinery and plant, and British manufacturers interested in the market should consider the advisability of opening branch establishments in the Dominion.

British Firms' Opportunities.—In regard to metals and metal manufactures the position of the United Kingdom is very satisfactory, but increasing competition from the United States, Canada, and other countries necessitates careful attention to requirements. The British share of the trade can be still further extended, particularly in lines such as ball and roller bearings, chain belting, lamps, lawn mowers, etc., where American products have obtained a large share of the trade, and in bar, bolt, and rod iron and steel, and manufactured iron and steel products, where Canadian firms are steadily doing more business.

British products control the market in gas heating and cooking appliances; iron and steel products, such as angles, tees, channels and girders, hoops, plates, sheets, tubes, pipes, and fittings; japanned and lacquered metal-ware, gas meters, railway and tramway plant, locomotives, screws, rivets and washers, and tin manufactures. There is an expanding market for steel frames for buildings. Openings also exist for tools and implements, total imports having increased from a value of £292,827 in 1927 to £301,957 in 1928.

A factor of the greatest value to British trade in metals, metal manufactures, and machinery is the preferential tariff granted. Many lines are admitted free of duty, a tariff of 20 per cent. *ad valorem* being levied on products of other countries. Where British products are liable to import duty, a preference of 20 per cent. *ad valorem* is generally granted.

Machinery.—Products from this country have not the same hold in the market for machines and machinery as they have in metals and metal manufactures, and the closest attention to requirements is absolutely vital. American firms are the most dangerous competitors. The markets for agricul-

tural machinery and implements and office machinery are almost entirely in American hands. In dredging and excavating machinery, while British imports on private account fell from a value of £17,161 in 1926 to £15,058 in 1927, American imports increased from £27,927 to £30,031. In 1928, trade in these materials declined, but the sales of American products suffered more than British. American products are rapidly capturing the trade in oil engines, and have already done so in portable and traction engines. Suitability, low price, and efficient marketing methods are largely responsible for this.

In regard to printing machinery, while British imports fell in value from £122,761 in 1925 to £64,364 in 1927, American imports increased from £61,269 to £84,485. Trade in this line also declined in 1928, but the British share improved. The market for dairying machinery is also in other hands. Churns are obtained from Australia, the United States, and Sweden; cream-separating machines from Sweden; and parts of milking machines from Australia. In all these lines British trade can be improved, provided requirements are met.

Trade Openings.—There are openings for increased British sales of air compressors, emery grinding machines, gas engines, grinding mill machinery, metal-working machine tools, mining machinery, sewing machines, transmission gear, glass and stone working machines, knitting machines, washing machines, clothes wringers, mangles, and clothes washers, weighing and wool-scouring machines, scales and balances, and miscellaneous machinery.

Lines in which the British share of the trade increased in 1927, compared with 1925, were bakers', biscuitmakers', and confectionery machinery, emery grinding machines, boring and well-drilling machinery, duplicating and addressing machines, typewriters, road rollers and graders, and tar-sprinklers. Markets controlled by British manufactures are those for blowers and fans, wood-working machine tools, bootmaking, leatherworking, flour-milling, gas-making and distributing, paper mill and woollen mill machinery.

In 1928, imports of agricultural machinery were valued at £182,571, and of dairying machinery at £153,192, the latter item showing a considerable increase over 1927 figures. Imports of engines also expanded as compared with the preceding year; gas, oil, and hot-air engines to a value of £56,791, and other engines valued at £128,565 were imported.

CHAPTER III

A considerable volume of trade is being lost by British firms in New Zealand through the absence of any indication of the source of origin of the product, both on the containers and in advertisements in the daily Press. Well-organized publicity campaigns are generally necessary; many foreign lines have a firm hold on the market as a result of extensive advertising campaigns. The average consumer seldom troubles to ask whether the goods required are British or foreign. He or she asks for lines whose names have become familiar as a result of publicity, and if British advertisers would emphasize "Made in England" in all their advertising the public would soon realize that when that slogan was absent the goods were not of British origin. This slogan is much more effective than "Buy British," particularly when the imported article is competing with a local product.

MOTOR VEHICLES

New Zealand's decreased imports of motor vehicles in 1927, compared with the preceding year, reflect the general decline in the buying power of the community. The years 1928 and 1929, however, showed a distinct revival. Purchasing power increased, with a consequent increase in the demand for motor vehicles. Imports in 1928 were valued at £2,766,919, an increase of £629,810 as compared with the preceding year. Present conditions are distinctly more favourable to the British exporter. Motor transport has ceased to be a luxury, and is now a necessary part of New Zealand life.

The great increase in motor traffic is clearly shown by the registration figures. In June, 1925, there were 71,403 motor-cars registered. By September, 1926, this figure had grown to 95,511, an increase of 31 per cent., and by January 31,

1929, the total motor-car registrations were 127,162. The number of motor trucks registered rose from 11,300 in June, 1925, to 24,382 on January 31, 1929. About two-thirds of the total were 1-ton trucks.

Commercial Vehicles.—Road development is a settled policy of the New Zealand Government, and the mileage open to traffic shows a steady increase. In June, 1925, there were 64,625 miles of roads and streets in the Dominion, of which 28,553 miles were metalled; by March 31, 1928, the total metalled had increased to 32,360. This steady development has led to a constant increase in the demand for motor vehicles, although recent legislation seriously hampers the extension of road transport systems. The market for commercial vehicles shows a steady growth; it is capable of yielding a good deal of trade to British manufacturers, for at present only about 20 per cent. of the imports come from the United Kingdom. The market is largely for the 1-ton and 1½-ton truck fitted with pneumatic tyres. The taxation on the heavier trucks adversely affects the sale and use of vehicles from 3½ tons upwards.

Tariffs.—Both public opinion and the import tariff favour the importation of chassis, as distinct from the complete vehicle. An import duty of 10 per cent. *ad valorem* is levied on motor vehicles under the British Preferential Tariff, and of 35 per cent. *ad valorem* under the general tariff. But additional duties are levied where such vehicles have bodies suited or designed for carrying passengers.

The additional duty is largely intended as a measure of protection for local body-builders. This industry in New Zealand is a thoroughly efficient and growing one, and British exporters will, generally speaking, find it good policy to leave the construction of bodies to the local manufacturers. The New Zealander prefers a body with wider seating accommodation than is usual in the British light car, and the seats must be capable of taking three people abreast. The market for light cars is steadily growing, demand tending in the

direction of the moderately priced vehicles. The lower cost of upkeep of the British light car, compared with American and Canadian cars, is distinctly in its favour. The hire-purchase system is increasing in popularity, and deserves careful consideration by British exporters.

The publicity given during recent years to the Australian and New Zealand markets for cars has resulted in the production of a type more suited to the existing conditions in these countries. Cars need more engine power, more space, and a wider wheel track than is common in Great Britain, and the necessity of gear changing must be reduced to an absolute minimum.

Marketing Methods.—The former lack of suitability of the British car to the conditions prevailing in New Zealand is not the only reason why British manufacturers have failed to capture a larger share of the market. Too much attention has recently been given to the product and not enough to the necessity for better marketing methods. Lack of advertising, faulty sales policies, and the cutting-down of agents' commissions to a level well below that given by competitive makers have had a very unfavourable influence. A careful study of local conditions and marketing methods and efficient service in regard to spares are vital to success.

Accessories and Motor Cycles.—In considering the value of the market for motor vehicles, the demand for tyres, parts, etc., must not be overlooked. In 1928 the value of imports of rubber tyres, tubes, and covers for motor vehicles, motor bicycles, and motor tricycles was £964,774, and of other materials and parts for motor vehicles at £222,442. A good market also exists for motor cycles, imports of motor cycles and tricycles being valued at £173,397 in 1928. In this section the British manufacturer has during the last four years gained control. Competition is mainly in the more expensive lines, where American machines have a good sale.

The general feeling throughout the Dominion with regard to trade prospects for British motor vehicles is that the open-

ings are distinctly favourable. The co-operative advertising scheme launched by the Society of Motor Manufacturers and Traders has been of the greatest value in arousing public interest in the British product, and has also had a favourable effect in trade circles.

CHAPTER IV

As New Zealand is only 1,200 miles from Australia it is very common for manufacturers to group the two countries together as Australasia, and imagine that the whole of the marketing campaign can be conducted from Sydney. It cannot be too strongly emphasized that New Zealand is a separate market and must always be treated as such.

ELECTRICAL EQUIPMENT

DIRECT contact with the market is of primary importance in the conduct of sales campaigns. This particularly applies to the electrical field, where the value of personal representation has been proved, especially by our chief competitors in certain lines. Before entering the market exporters should send out a responsible executive to make a detailed survey, lasting some three to four months, of possibilities in each area, of hydro-electric development throughout the country, and the probable trend in demand.

Water Power Schemes.—The first Government hydro-electric scheme was started in New Zealand a few years before the outbreak of the war. The Government realized the potential value of the enormous resources in hydro-electric energy in the Dominion, and commenced the first of a series of schemes designed to link up in a high tension transmission scheme all the main points of supply throughout each of the two islands.

The great resources make it possible for every home to have its supply of electric power. The ultimate end, however, does not rest there, but also includes the provision of power for both primary and secondary production in every industrial centre, and every country district. "Electric cur-

rent for all, in town and country" is the policy of the Government.

The extract from the Public Works statement for the year ended March 31, 1929, shows the progress that has been made. The capital expenditure of the Government has grown from £362,000 at March, 1916, the first complete year of supply from Government stations, to £8,467,735 at the end of March, 1929; the expenditure during the year 1928-29 was £943,807.

The capital expenditure of local authorities connected to Government supply increased during the same period from £200,000 to £11,534,318. Other electric supply authorities not connected with the Government supply had a capital of £6,088,424 invested in electric undertakings. Many gas, steam, and oil plants, which will eventually be replaced by electric power plants, are still running. Funds are still available, and will be expended in the near future on further schemes.

Growing Consumption.—The importance of these developments to the British manufacturer of electrical machinery and appliances is self-evident. Of a total population of the Dominion approximating 1,500,000, in 1923 there were 107,000 consumers of electric power out of a population in the power-supply areas of nearly 700,000. By 1927 the number of consumers had increased to 228,345, and still more are being added each year. There is ample room for expansion, with the consequent increased demand for electrical appliances.

The great strides made in the development of electrical power make the market well worth very careful investigation. The Government schemes already arranged are nearing completion, but others will probably follow.

Effect of Preference.—The inhabitants of the Dominion have a marked preference for British goods. That such preference is the policy of the Government is very clearly shown by trade returns and by the tariff duties levied on im-

ports. The import tariff was revised in 1927, and the new duties showed a material increase in the preference accorded to imports of electrical machinery and appliances from the United Kingdom. Before the new tariff came into operation the preference was, in general, 10 per cent. *ad valorem,* but under the revised tariff it is increased to 20 per cent.

The effect of this increased preference should be thoroughly realized by British manufacturers. In the majority of lines of electrical machinery and appliances it will give them a virtual monopoly of the market, for foreign manufacturers will be unable to compete against such a handicap. This, however, depends upon one vital factor—*prices must be kept as low as possible.*

The following table gives the chief classes of imports of electrical machinery and appliances and details of the import duty levied on each under the British and general schedules:

IMPORT TARIFF FOR ELECTRICAL GOODS

Class.	*British.*	*General.*
Machinery or appliances for the generation of electricity, the transformation of pressures of electric currents, locomotives, insulated cable and wire, electric motors, slide rails, switchboards, carbon, sparking plugs, wireless receiving sets, etc. ...	Free	20 per cent. *ad val.*
Incandescent filament electric lamp bulbs, not being peculiar to surgical use	1d. to 6d. per bulb	2d. to 1s. per bulb
Electric lamps, not being peculiar to surgical use	10 per cent. *ad val.*	30 per cent. *ad val.*
Electric insulators	25 „ „ „ „	45 „ „ „ „
Electric cooking and heating appliances	20 „ „ „ „	40 „ „ „ „
Electric meters	Free	20 „ „ „ „

Imports of electrical machinery and equipment during 1928 had a total value of £1,762,463, as compared with £2,041,003 in 1927. Competition from the United States is very keen in batteries and cells, generators, motors, transformers, incandescent filament lamp bulbs, and telegraphic and telephonic appliances.

The great strides made in the development of hydro-electric power have resulted in a very decided upward trend in the demand for electrical goods. Formerly electric power was used almost exclusively for lighting. To-day, with the advent of electric motors and the application of electricity to heating, the proportion of electric current used for lighting is comparatively small. It was estimated in 1928 that lighting consumed 17 per cent. of the total, power 23 per cent., and heating (including cooking) 60 per cent.

Electricity in the Home.—The growing use of electricity in the home is shown by the number of consumers using electric water-heaters, which increased from 6,654 to 14,160 during 1927—*i.e.*, by 113 per cent. Of the 96 electric supply authorities engaged in 1929 in retail distribution of electric energy, 86 had an aggregate total of 20,254 electric ranges connected to their systems; the number installed represents an increase of 28·4 per cent. during the year 1928-29.

Electric cookers, irons, radiators, kettles, ranges, lamps, ovenettes, fans, vacuum cleaners, toasters, etc., are in general demand. As the number of homes supplied with electric current is steadily increasing, the demand for household electrical appliances, particularly cookers, is increasing in like proportion. An expanding field is thus available for British manufacturers, a field which will well repay closer attention by British exporting firms.

Use in Industry.—The use of electric power in manufacturing industry, agriculture, and dairy farming is also rapidly extending. This is particularly noticeable in dairy farming, the number of electrically driven milking machines having

increased from 548 in 1922 to 3,581 in 1925, 4,856 in 1926, and 10,161 in 1929.

The rapid advance in road and rail transport facilities affords yet another field for the British manufacturer.

In order to obtain the largest share of this rapidly increasing market British exporting houses must, however, have capable representatives on the spot. Reports of tenders open, etc., and details of developments pending, can often be obtained in London. But the firms which will obtain the lion's share of the trade must get their reports from New Zealand itself, and not be content with information which is common property.

CHAPTER V

After the distribution of a product has been satisfactorily arranged in New Zealand a well-organized publicity campaign should be undertaken. Detailed information regarding the nature of the product, the extent of distribution, etc., must be supplied to the advertising consultant. The chief advertising medium is the daily Press.

HARDWARE AND CUTLERY

British hardware, hollow-ware, implements, tools, paints, cutlery, and agricultural machinery have excellent openings in the New Zealand market. Competition is mainly in design and finish, not in price. The method of sale and distribution is of the greatest importance. In the chief towns the ironmongers' shops stock all hardware and allied lines. In the country districts, however, the great majority of goods of all kinds are sold through the general store. The storekeeper must be supported in his selling by a plentiful supply of catalogues, show-cards, and other literature.

Domestic Hardware.—The market for domestic hardware is largely in British hands, but competition is very keen. Germany is slowly regaining her pre-war position, mainly at the expense of the United States. The demand for aluminium ware is the result of British enterprise, and British manufacturers should show more activity in meeting German competition. German firms are, in many instances, placing a cheaper, but poorer quality, article on the market; the best way to counter this is for the British maker to brand his lines and stamp them "Made in England," for British quality is appreciated where the article can be distinguished.

Tools.—A variety of tools, from garden implements to axes, shovels, spades, picks, forks, tools for flax cutting and

sheep shearing, and carpenters', engineers', joiners', and other artisans' small tools is required. Keen competition is shown by American and Canadian manufacturers. It is very satisfactory to find that, largely because British makers produce articles better suited to market needs in style and finish, the United Kingdom's share of this trade is increasing. It is of vital importance that careful inquiry should be made as to the style of tool required. America has obtained the greater part of the trade in axes, saws, hammers, etc., because her tools are suited to market requirements. German competition is growing, particularly in cheap garden and other tools, which are in good demand. Handles for axes and other tools have a good sale, imports exceeding £20,000 in value per annum; demand is largely satisfied by the United States. Nail-drawing tools are in good request. Mining tools are needed in the coal and gold industries.

A good demand exists for bolts, nuts, washers, rivets, nails, stoves, grates, sanitary cast-iron goods, cooking and washing boilers, etc. The market for nails is in American hands, for the ordinary British nail is not suited to requirements.

Builders' Hardware.—Builders' hardware is in steady demand and provides an expanding market for British articles. Galvanized iron has a ready sale, particularly in the country areas. A good market exists for paints and painters' materials; British firms have secured the greater part of this trade, but New Zealand is developing her own industry for the production of paints. Imports of paints, colours, and varnishes were valued at £380,895 in 1928, demand being mainly for recoating the walls and roofs of buildings, an operation that is necessary about every five years.

Wire.—There is an excellent market for wire netting and barbed and plain wire, imports totalling some £250,000 in value each year. Government regulations regarding the fencing of land and the use of rabbit-proof netting are largely responsible for the steady demand. British sales of wire are

growing, the better qualities competing successfully with the cheaper lines of competitors. Care should be taken that the coils of wire are of the weight required for transport, for in many country districts transport is still by pack-horse: German attention to this point resulted in an increased call for their products.

Cutlery.—Cutlery is in good demand, and most of the trade is done by British firms. Table cutlery "Made in Sheffield" is in general request. There is no local competition, but certain American makes have a small sale. The trade in cheaper lines, such as pocket-knives, is also in British hands, but German competition is increasing.

Agricultural Implements.—The market for agricultural implements is almost entirely in the hands of American and Canadian firms. Conditions in North America have resulted in the production of implements suited to that area, and as conditions in New Zealand are somewhat similar these implements are also suited to the New Zealand market. If British manufacturers would send over implements suited to the market in style and finish their products would quickly sell.

Ploughs, drills, cultivators, mowers, reapers, and binders are constantly required, but more attention must be paid to labour-saving devices, such as levers for lifting a plough on its side and gauges for drills, before British makes can compete successfully with North American products.

CHAPTER VI

The packing, boxing, and labelling of goods for this market need very careful attention. British goods, in general, do not possess a high reputation in this respect, for the packing is often far below that of similar foreign articles. Wherever possible it is advisable to pack in cartons, a method which is far more satisfactory from the retailer's point of view, for goods are often shelved for a considerable period. Fragile goods should be wrapped in corrugated paper before being placed in the carton.

The outsides of the boxes, etc., should carry a bold, and preferably artistic, description of the article, which will convey both to the retailer and the consumer all they need to know. Better quality lines such as silk and artificial silk underwear, etc., should be packed separately, each article in its own box. This method results in higher freight costs, but is well worth the extra expense. Each box carries the brand of the manufacturer and is an advertisement in itself.

GROCERIES AND CONFECTIONERY

British exporters of groceries, provisions, and confectionery will find the problem of price very important in the New Zealand market. In this direction the recent revision of the Customs Tariff has not been to the advantage of the importer, whether British or foreign. In the majority of grocery lines the import duty has been changed from one reckoned on weight to an *ad valorem* duty of 20 per cent. on goods of British origin and 40 per cent. on foreign products. In the case of confectionery and chocolate all lines are now subject to an *ad valorem* duty of 25 per cent. British and 45 per cent. foreign. It can therefore be seen that the import duty must

be seriously considered if British firms are to bring their prices into line with those of the local article.

The effect on price of the tariff is even greater than appears at first sight, for the duty is reckoned on the current domestic value in the country of origin, plus 10 per cent. A duty of 20 per cent. *ad valorem* consequently adds more than 20 per cent. to the domestic price of the article. In addition, a primage duty of 2 per cent. *ad valorem* is also payable in practically all cases, whether the article is dutiable or not.

Competition.—The production of articles of food is an important industry in New Zealand, and the local manufacture of packed groceries and provisions is steadily increasing. Keen competition is experienced, particularly in the cheaper lines, from Australia, whose proximity to the market is of considerable value. The American share of the trade in provisions has shown an increase in recent years, largely as a result of extensive advertising of certain brands, sound methods of distribution, and the use of attractive containers. Where competition from local or foreign products exists, British grocery lines must be specially brought to the notice of the consumer. Local grocers prefer to sell the local product, only supplying imported goods when they are specifically asked for. Sales of British goods will consequently increase only where they are known to the consumer.

Pickles and Sauces.—Business in grocery and provisions was somewhat difficult during 1927, but has shown an improvement since that year. A steady demand exists for pickles and sauces, particularly for the moderately priced article; imports in 1928 were valued at £18,987. In 1926-27 there were 20 factories in New Zealand making pickles, sauces, and vinegar. A good standard of production has been reached, but in many lines the imported British article compares favourably with the local product. The lower price of the latter, however, results in its having the greater share of the sale. Good quality British sauces will find a sale,

despite competition from cheap brands. Salad dressings are generally imported, demand being largely for the better quality lines. The local product controls the markets for gravy brownings and bulk vinegar, but a good demand exists for branded imported bottled vinegar.

Jams.—A satisfactory demand is shown for imported jams and marmalades, partly because the price often compares favourably with that of the local product. Imports in 1928 were valued at £28,555. In jellies and lemon cheese the market is limited, and there is strong competition. Lemon cheese sells best in November and December. In biscuits, the demand for the lower-priced article is largely satisfied locally. In 1928 imports of biscuits, excluding ships' plain biscuits, were valued at £10,370. Dutch competition is increasing in fancy lines.

Tinned Foods.—A strong demand is shown for potted meats and fish pastes, which present openings for British products; local and American competition is very keen. The market for canned and other fish is of considerable value, imports reaching £182,090 in value in 1928. The demand is mainly for salmon, supplied chiefly by Canadian firms, which have captured the former market for British herrings. Some demand still exists for herrings in tomato sauce, and sardines have a fair sale. American firms have a strong hold on the market for sausage casings and skins, preserved meats, and dried vegetables. Australian products predominate in the tinned fruit trade; there is a growing demand for fruits bottled and preserved in syrup.

Confectionery.—Trade in confectionery, cocoa, and chocolate is well maintained, the sales of British products showing an increase in certain lines. There are three main sections of the confectionery market—chocolate confectionery in fancy packages, the competition being mainly from Australian, Canadian, and Swiss firms; chocolate in plain trade packages, competition coming from Australia and Canada; and confectionery other than chocolate, competition being

chiefly from Australia and France. British lines in each of these sections have some 40 per cent. of the import trade.

A promising market for British exporters is that for cocoa butter for use in the local confectionery industry. Imports in 1928 were valued at £130,037 compared with £106,582 in 1927; severe competition is experienced from Dutch firms.

CHAPTER VII

Publicity plays an important part in many marketing campaigns in New Zealand, but it must not be confined to the Press. When the quality and standard of a product have been established, attention should be given to reminder aids such as posters and electric signs. Cinema advertising is of growing value, and organized window-display campaigns in the principal towns are of considerable importance. Direct mail advertising can be used with advantage in certain lines, and full use should be made of exhibitions and fairs.

POTTERY, GLASS, AND GLASSWARE

A FACTOR of the greatest importance to British manufacturers interested in the New Zealand market is the preferential tariff granted to products of British origin. In the market for pottery, glass, and glassware this tariff preference is of particular value. Competition is largely from cheap foreign lines, local production not being of great importance. Total imports of earthenware, china, glass, and glassware exceed an annual value of £600,000. British products control the majority of lines, imports from this country having more than regained the position they held before the war. Germany had a strong hold on this market in pre-war days, and is now making a determined effort to regain her former trade.

Quality Lines.—British quality lines with well-known names always have a sale. Trade marks are of the greatest importance. China, porcelain, and parianware are obtained chiefly from the United Kingdom. A tariff preference of 20 per cent. *ad valorem* is granted to products from this country. British manufactures during the post-war period have made a careful study of the market and its requirements, and are competing successfully with the cheap Continental lines.

China and Earthenware.—Competition is very keen in the cheap medium and low grade china teaware of bright design, and also in earthenware fancies; German competition is growing. In chinaware and earthenware the class of products required is very similar to the class in demand in the United Kingdom. The finer and lighter lines of bone china are in keen request for hotels, restaurants, and better quality household use. Decorative lines are preferred. British manufacturers have kept the trade in close touch with new designs and patterns, and control the market for quality lines. Earthenware is wanted by the cheaper hotels and up-country households, and a very good market exists for cups, saucers, dinner sets, dessert services, and similar goods.

Stoneware.—Stoneware is in demand for pots, etc. Plain earthen jars and plain stone bottles have a small sale, imports being chiefly from the United Kingdom and Australia. There is an excellent demand for drainage pipes, drainage tiles, filters, etc. British lines, which receive a tariff preference of 20 per cent. *ad valorem,* control the market; competition is mainly from Germany, Czechoslovakia, and Japan. Fireclay manufactures and round fireclay have a small sale.

Glass and Glassware.—The market for glass and glassware is of considerable importance to British manufacturers, whose goods receive a tariff preference of from 10 per cent. to 20 per cent. *ad valorem.* Openings exist for an expansion of trade in window and plate glass. In 1928 private imports of common window glass were valued at £27,489; the United Kingdom obtained a much more satisfactory share of this trade in this year as compared with 1927, although the 1926 position—owing to Belgian competition—was not regained. Plate glass for the manufacture of bevelled and silvered glass is also obtained largely from Belgium, but the Netherlands and Czechoslovakia have a fair share of the trade. The market for other kinds of plate glass is controlled by British firms, the United Kingdom supplying private imports valued at £48,088 out of a total of £55,665. Other sheet glass, in-

cluding coloured and reinforced sheet glass, has a good sale. Total imports increased from a value of £15,984 in 1925 to £62,201 in 1927, but fell to £44,309 in 1928. The trade is almost wholly in British hands; Belgium is the only competitor of importance, and her share fell heavily in 1928.

Glass Bottles.—Plain glass bottles have a ready sale. The British share of this trade can be extended, for Australia supplies the greater part of the trade.

English cut glass has a ready market, and demand shows a steady expansion. Competition is mainly in the cheaper goods from Germany, Czechoslovakia, and the United States. British trade in these lines is capable of considerable growth; cheap glass tumblers are wanted. There is a growing demand for electric light bulbs.

The market for plain glass jars is largely in Australian hands. Openings for British products exist in this section, and also in the market for unmounted lenses of all kinds. The latter are mainly imported from the United States and Canada, the British share of the trade being very small. Mirrors and bevelled and silvered glass are obtained mainly from the United Kingdom.

Tiles.—Flooring, wall, hearth, and garden tiles have a good market. The trade is almost entirely in British hands. Glass or earthenware roofing tiles and ridging have only a small sale. There is a demand for sanitary fittings of all kinds, both for private houses and for public buildings. Building cement is obtained mainly from the United Kingdom. There is a small market for firebricks and for bricks of magnesite, etc., for retorts and furnaces.

CHAPTER VIII

In New Zealand, as in other Empire markets, it must be appreciated that the manufacturer's interest in his goods does not necessarily end with the sale to the consumer. Service after purchase is a vital selling factor in many lines.

PAPER AND STATIONERY

The market for imported paper and stationery is of growing importance, the increased demand reflecting the expansion in the local printing and publishing industry. Trade with the United Kingdom is encouraged by a tariff preference of 20 per cent. *ad valorem* in the majority of lines. Imports on Government account are obtained almost entirely from the United Kingdom, a factor of considerable value to British exporters.

Printing Paper.—Imports of newsprint have increased in quantity each year since 1924, rising from 337,910 cwt. to 461,450 cwt. in 1928. Owing to fluctuations in price the value fell from £415,714 in 1926 to £381,774 in 1928. The outstanding feature of this trade is the growth in imports from Canada; in 1924, 139,919 cwt. were obtained from the United Kingdom and 197,695 cwt. from Canada; in 1928 the Canadian share had increased to 324,835 cwt., while the United Kingdom share had fallen to 135,919 cwt.

In other printing paper British exporters have retained their hold on the trade, although imports from foreign countries rose from 4,149 cwt. in 1927 to 22,036 cwt. in 1928. The British share, at 86,121 cwt., showed an increase, while imports from Canada fell to 8,739 cwt. Total imports of paper other than printing paper, valued at approximately £500,000 in 1928, remained fairly steady.

Wrapping and Writing Paper.—The market for unprinted wrapping paper is of considerable value, but imports are obtained almost entirely from Canada, the United Kingdom share of the trade being negligible. Wrapping paper for orchardists' use comes mainly from the United States, and vegetable parchment and grease-proof paper from Belgium, France, and Norway. Waxed paper is imported from the United Kingdom, Australia, and the United States; competition from the United States is of growing importance. The demand for writing paper reaches £100,000 in value per annum; the market is largely in British hands, but in 1927 and 1928, compared with 1926, imports from the United Kingdom declined. Canada is an important competitor in this trade.

Only a small opening exists for imported paper bags, as local manufacturers largely satisfy requirements. Emery-paper, glass-paper, and emery-cloth are wanted; British firms interested in this trade, which is done chiefly with the United Kingdom, will find American competition of importance. German products compete in filter-paper and filter pulp. Paper felt and carpet felt have only a very small sale. Paper patterns for costumes are chiefly supplied by American firms.

Wallpaper.—Paperhangings and wallpapers have a steady sale. The total trade approaches an annual value of £100,000. The large proportion of wooden houses favourably affects demand, and the steady increase in the number of brick and stone houses has not had a noticeably adverse influence. The trade is principally with the United Kingdom, although some competition is experienced from Canadian firms. In good quality lines of quiet design British products control the market. Care must, however, be given to the selling organization, good representation and showrooms being very important.

Boards.—Cardboard, pasteboard, strawboard, millboard, and other boards are required, total imports in 1928 being valued at £104,817. The United Kingdom share was worth

£24,026. Strong competition is experienced in particular lines from Canada, Sweden, and the Netherlands. Openings exist for an expansion in imports from the United Kingdom, particularly in Bristol board, cardboard, and pulp boards. The demand for cardboard and paper boxes and of materials for such boxes is not very large; it is mainly satisfied by British production, competition being from Canadian and German firms. Cardboard cream mugs and honey and other jars are obtained almost entirely from the United Kingdom.

Stationery.—British exporters of manufactured and other stationery will find a ready sale for their products; imports increased in value from £241,462 in 1927 to £264,929 in 1928. The trade is mainly in British hands. Competition in manufactured stationery is chiefly from Australia, which supplies the cheaper lines, and in other stationery from the United States of America. Local production is not of importance. Good quality boxed stationery and office stationery are in growing request.

Both printed and plain envelopes have an expanding market and present good openings; the trade is almost entirely with the United Kingdom. There is a brisk business in imported books, papers, and music. British publishers will find the market of very considerable value; close attention to methods of selling and advertising will be well repaid. Competition is chiefly from Australia and the United States. Calendars, Christmas cards, and showcards are in request, and are obtained largely from the United Kingdom.

CHAPTER IX

The year 1928 showed a still further improvement in the oversea trade of New Zealand. Business conditions in the Dominion improved and the outlook is very satisfactory. Close attention to the market is essential if the British share of the import trade is to expand, for competition, particularly from the United States and Canada, is very keen.

WIRELESS APPARATUS

A MARKET which has been largely ignored by British producers is that for wireless goods. The remarkable expansion in this trade since 1926, and the great possibilities for the future, have not been fully appreciated by manufacturers in Great Britain. Every month shows progress in the number of wireless receiving licences, the rate of increase in 1928 exceeding 1,000 a month. The potential value of the market can be estimated from the number of dwellings, which was 290,731, according to the census of 1926, and is now about 300,000. The number of dealers in wireless goods, who must all be licensed, exceeds 1,400.

On July 16, 1927, 2YA, one of the most powerful broadcasting stations in the world, was opened at Wellington. Other stations have been opened. Developments up to the present have been mainly in North Island, which contains about three-quarters of both receivers and dealers.

The market has been well cultivated by American firms, and the great majority of the advertisements in the Press are of American lines. The American sets are usually cheaper than the British. There is no reason why British products should not compete in price, for imports from the United Kingdom receive a substantial measure of tariff preference.

Market Requirements.—British manufacturers should inquire carefully into the requirements of the market. Regulations have been issued regarding wireless products, and every set entering the country is inspected by Postal Department wireless experts. Packing is of great importance, and attractive cartons have a strong selling value. British wireless valves have, in general, a good reputation.

The use of crystal and low-powered valve sets is mainly confined to the urban areas of Wellington, Auckland, Christchurch, and Dunedin. The broadcasting station at Wellington relays concerts, news, etc., from all parts of the world, and the relayed items can be picked up in the immediate area with crystal sets. One and two valve sets are also mostly used in the immediate neighbourhood of the chief broadcasting stations.

Higher powered sets, while in use in the chief towns, are wanted mainly in the country districts. Sales of both complete sets and of parts are expanding. In the rural areas five valve to eight valve sets are required, and the farmer class, in general, is able to afford the more expensive products. A high-powered set is of the greatest value to the isolated dweller in the country districts, not only for listening to concerts but also for general news and weather reports and forecasts.

Long-range Sets.—Long-range complete sets should be as reasonable as possible in price, and encased in cabinets which will be attractive as articles of furniture. Such sets must be sufficiently selective to pick up any of the leading New Zealand stations—which are as closely grouped as to wave-length as the B.B.C. stations—and also the chief Australian stations. Well-finished instruments with high-frequency stages and adequate screening arrangements are consequently necessary. The distances and physical configuration of the country necessitate normally two high-frequency stages and two low-frequency stages, or pentodes in expensive receivers. Two-volt valves are mainly favoured, and plate current from either dry cells or battery eliminators is generally chosen. The in-

crease in the use of electric power in households is resulting in many instances in dry cells being replaced by battery eliminators, and in a growing demand for all-mains instruments.

Portable Sets.—Portable sets are in request, and sales are likely to expand. The New Zealander is fond of open air, and realizes that a wireless set adds considerably to the pleasures of camping out. The attention given by the wireless journals to such details as the erection of temporary outdoor aerials, etc., suggests that a moderately priced portable or transportable set will find a ready sale.

The market is at present in a transition stage. Demand is largely for parts for home construction; these are assembled by the purchasers, generally with the assistance of the local dealers. The popular demand for low-priced sets should expand considerably during the next two years.

NEW ZEALAND

MARKET DATA

Area and Population.—The Dominion of New Zealand has an area of 103,285 square miles: including islands, the total area is 103,862 square miles. The population on June 30, 1929 (exclusive of Maoris), was 1,404,520; including Maoris, the total was 1,470,452. The following table gives the population according to districts.

Provincial District.	*Population.**	
	Census, 1926.	*Estimated, April* 1, 1928.
North Island.		
Auckland	424,531	444,450
Hawkes Bay	65,620	67,960
Taranaki	68,162	69,610
Wellington	273,500	285,460
Total	831,813	867,480
South Island.		
Marlborough	18,317	18,470
Nelson	50,677	51,270
Westland	15,129	15,620
Canterbury	213,890	220,170
Otago:		
Otago portion	149,522	149,080
Southland portion	65,121	66,610
Total	512,656	521,220
Dominion total	1,344,469	1,388,700

* Excluding Maoris.

The chief urban areas, and their estimated populations (including Maoris) on April 1, 1928, are:

Town.	*Population.*
Auckland	206,810
Wellington	130,120
Christchurch	123,370
Dunedin	84,060
Wanganui	27,510
Invercargill	22,910
Palmerston, North	20,940
Napier	18,870
Timaru	17,540
Hamilton	17,350

Production.—The following table gives the value of production, by classes, for 1910-11, 1919-20, and 1926-27:

Group.	1910-11.	1919-20.	1926-27.
	£	£	£
Agricultural	4,026,526	8,967,933	8,843,267
Pastoral	20,169,907	38,395,940	33,369,530
Dairying, poultry, and bees	6,352,245	19,270,181	25,912,753
Mining	3,774,898	3,778,682	3,329,047
Factory products	8,143,334	15,557,618	23,118,728
Fisheries	219,403	386,059	531,600
Forest products	3,465,778	3,912,964	5,712,944
Production of builders, labourers, and industrial workers	5,752,351	9,151,600	13,496,947
Total	51,904,442	99,620,977	114,314,236

The table below gives the number of establishments and the gross value of products by classes of industry for the years 1925-26 and 1926-27.

Class of Industry.	1925-26.		1926-27.	
	Establishments.	*Value of Products.*	*Establishments.*	*Value of Products.*
		£		£
Animal food	611	35,658,364	605	33,880,830
Vegetable food	131	6,386,942	142	6,255,903
Drinks, narcotics, etc.	219	2,293,646	228	2,467,143
Animal matters, n.e.i.	73	1,187,654	81	1,266,234
Working in wood	629	6,507,753	580	5,834,335
Vegetable produce for fodder	8	89,452	8	90,338
Paper manufactures	18	330,678	19	343,738
Heat, light, and power	160	5,499,195	158	6,109,861
Processes relating to stone, clay, glass, etc.	195	2,118,017	215	2,222,537
Metals other than gold or silver	406	3,603,150	443	3,637,643
Precious metals	39	123,720	41	109,178
Books and publications	325	4,407,655	344	4,527,696
Musical instruments	6	43,510	7	31,642
Ornaments and minor art products	58	146,687	63	146,538
Sports equipment	4	21,248	4	27,242
Designs, medals, type, and dies	16	48,332	16	55,891
Machines, tools, and implements	39	837,347	37	737,626
Carriages and vehicles	815	2,213,031	967	2,515,026
Harness, saddlery, and leatherware	152	3,092,144	166	2,342,941
Ships and boats	61	585,540	67	496,557
House furnishings	315	1,394,322	358	1,717,986
Chemicals and by-products	63	1,737,547	71	1,895,036
Textile fabrics	17	1,213,817	16	1,107,333
Apparel	326	4,052,183	339	4,104,093
Fibrous materials	82	901,608	85	826,404
Miscellaneous	23	228,892	28	262,752
Total	4,791	84,792,434	5,088	83,012,503

Overseas Trade.—The table below shows the value of overseas trade:

Year.	Imports.	Exports.
	£	£
1913	22,288,302	29,986,722
1926	49,889,563	45,275,575
1927	44,782,946	48,496,354
1928	44,886,266	56,188,481

In 1928 the United Kingdom supplied 47·43 per cent. of the total imports into New Zealand: the nearest competitors were the United States with 18·28 per cent., Australia with 7·79 per cent., and Canada with 7·26 per cent.; of New Zealand's exports in that year 72·09 per cent. were taken by the United Kingdom. The following table shows for each of the four years 1925 to 1928 the percentage of imports from the principal countries supplying goods to the Dominion:

IMPORTS.

Country.	1925.	1926.	1927.	1928.
	Per Cent.	Per Cent.	Per Cent.	Per Cent.
United Kingdom	48·75	45·76	47·93	47·43
Canada	7·47	6·88	6·12	7·26
India	1·74	1·73	1·70	1·74
Ceylon	1·62	1·74	1·91	1·92
South African Union	0·22	0·28	0·27	0·23
Australia	10·01	9·27	8·64	7·79
Fiji	2·37	1·79	0·95	1·27
Other British countries	0·78	0·85	1·07	1·00
Totals, British countries ..	72·96	68·30	68·59	68·64
Germany	0·95	1·35	1·87	2·00
France	1·75	1·63	1·90	1·83
Belgium	0·84	0·79	0·85	1·11
Japan	1·32	1·17	1·27	1·28
Dutch East Indies	1·17	1·59	1·89	2·23
U.S.A.	16·94	20·05	18·04	18·28
Other foreign countries	4·07	5·12	5·59	4·63
Totals, foreign countries ..	27·04	31·70	31·41	31·36

IMPORTS (BY CLASSES).

Class.	1927.	1928.
	£	£
Foodstuffs of animal origin	346,150	356,571
Foodstuffs of vegetable origin and common salt	3,510,450	3,469,502
Beverages (non-alcoholic)	1,021,826	1,039,948
Spirits and alcoholic liquors	962,672	818,597
Tobacco, etc.	1,729,286	1,501,617
Live animals	72,328	74,600
Other animal substances	81,796	109,387
Vegetable substances and fibres	584,605	630,763
Apparel	4,363,834	4,661,327
Textiles	5,158,752	5,449,414
Manufactured fibres	643,838	689,781
Oils, fats, and waxes	3,173,607	2,863,592
Paints and varnishes	388,524	380,795
Stones and minerals	558,624	384,035
Specie	280	42,164
Metal and ores	527,810	419,320
Metal manufactures, n.e.i.	5,004,071	4,648,457
Machinery and machines	4,157,633	4,130,899
India-rubber and manufactures thereof	92,492	94,736
Leather and manufactures thereof	428,744	443,566
Timber	800,143	750,072
Wood, cane, and wicker manufactures	181,477	201,072
Earthenware, china, glass, stoneware, and cements	877,470	866,628
Paper	1,087,062	1,095,174
Stationery	908,391	934,290
Jewellery, timepieces, and fancy goods	798,175	776,326
Optical, surgical, and scientific instruments	570,584	494,449
Drugs and chemicals	1,210,027	1,217,892
Manures	495,284	617,961
Vehicles	3,716,644	4,384,093
Miscellaneous	1,330,367	1,339,238
Total	44,782,946	44,886,266

"SERVICE"

in the

South African Market

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SOUTH AFRICA

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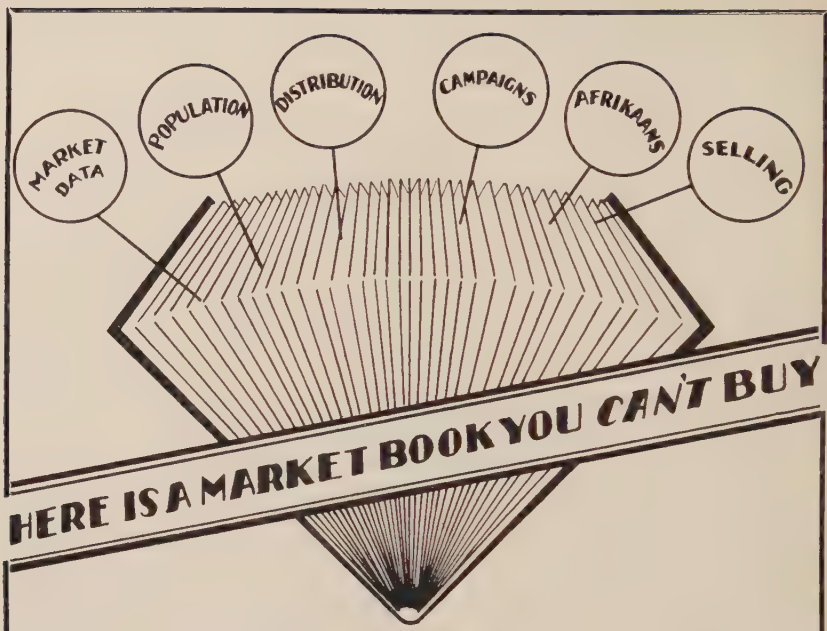

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SOUTH AFRICA

CHAPTER I

The steady progress in the economic development of South Africa has resulted in an expanding market which, if properly handled, will prove of growing value to British trade. Marketing campaigns, however, must meet the requirements of the inhabitants of the Dominion, and show the enterprise that is vital to success. Efficient sales agents are essential, and the public must be educated by good publicity methods to demand British products. In distribution and selling, co-operation between firms engaged in the same trade is of the greatest value, while co-operative advertising has a pulling power which should not be ignored. Advertising schemes should not be confined to the daily Press, but extended to cover trade and technical journals and, where necessary, the various forms of outdoor publicity.

TEXTILES AND WEARING APPAREL

The market for textiles and wearing apparel has been fairly satisfactory during the last few years, with an improving tendency in many lines. Recent reports from the Dominion state that the position of the farming community has improved as a result of good wool prices, a satisfactory maize crop, and fair rains, and that, in consequence, an increased demand for soft goods is being experienced in the country districts.

British goods have a firm hold on the market, and closer attention to local tastes and requirements would result in increased sales. The revised import tariff of 1925, which

abolished British preferential rates on the majority of lines, is not of great assistance to the British manufacturer, but preferential rebates of 5 per cent. *ad valorem* are now granted to British imports of hosiery, laces, embroidery, and certain specified cotton piece-goods. Other textile and apparel items are subject to the same duty as that levied on goods of foreign origin.

Local Competition.—Home competition is steadily growing in certain lines. The production of blankets is of importance; several shirt factories have been established, and hosiery, pyjamas, boys' ready-made clothing, and other outer garments, rugs, and tweeds are also produced. Between 1916 and 1924, mainly owing to the difficulty of obtaining oversea goods during the war, the value of the home output showed a considerable increase; the production of clothing and textiles rose from a value of £1,301,000 in 1916 to £3,970,325 in 1926-27.

The protective tariff has resulted in further developments since 1925, but the increased scales of wages imposed under the Wages Act have had an adverse effect on the local clothing, shirt, pyjama, and leather industries. The large wool clip and the development of raw cotton production will doubtless result in a still further growth in the textile and clothing industry in the future, but the common belief that clothing manufactured in South Africa is not so good as the imported article is favourable to a continued demand for British products.

Lines in Demand.—A good demand exists for raincoats, woollen and cotton piece-goods, hosiery, men's hats, the cheaper lines of men's shirts, carpets and rugs, silk and artificial silk hosiery and underwear, and woollen and cotton underclothing. British firms which undertake regular seasonal campaigns are obtaining very satisfactory results. An excellent opening exists for a firm which can place on the market an "all-the-year-round" class of underwear, and there is also an opening for a well-named men's shirt suitable for the farm-

ing community. This latter must not, owing to the prejudice of the Dutch section of the population, be khaki in colour. The demand for artificial silk goods is small at present, but it is slowly growing and is well worth careful attention. The market for silk goods is of considerable importance, but is likely to suffer from the competition of artificial silk.

Hats and Caps.—In hats and caps there is strong competition from the United States of America. The market for the Stetson type of hat, the type commonly worn, is in American hands; a wide-brimmed, branded line of British hat would find a good sale if properly marketed. Up-country, British hats of double felt have a ready sale; no market exists for the sun-helmet type of hat common to the East. The attention given to all forms of sport has resulted in an excellent and growing demand for sports wear and equipment.

Sports Equipment.—There is very little home production in these lines, and the market has been badly neglected by the British manufacturer. British sports goods have an excellent name, and cricket and tennis flannels, swimming costumes, football shirts, tennis shoes, etc., as well as cricket bats, tennis racquets, football boots, and other sports wear, will find a ready sale. Prices should be kept as low as possible, and goods should be branded.

Careful attention to this market, which is steadily expanding, would result in United Kingdom products obtaining—and holding—the greater part of the trade.

Leather Goods.—The home leather and leatherware industry has made great strides since the war, largely owing to the protection given by the import tariff. The value of the output of leather and leatherware rose from £1,240,000 in 1916 to £2,877,000 in 1924, and since the imposition of the 1925 tariff has shown further development, the gross value of output in 1926-27 being valued at £3,457,286. South African products now supply about two-thirds of the demand for boots and shoes.

The market for the cheaper lines is entirely in the hands

of the local manufacturer, who also has a share of the trade in the better quality lines. The high customs tariff does not, however, prohibit the importation of better quality British products. Such goods have a ready sale, but it must be remembered that this applies mainly to lines carrying a well-known branded name. The name must be kept before the public, for the buyer generally asks for the line by name.

CHAPTER II

Before entering the South African market the British manufacturer should get in touch with a reputable organization which can provide him with a detailed survey of the market, arrange his distribution, and handle his publicity campaign. An organization with offices in both London and in South Africa is best suited for this purpose. Advertising is an essential part of every marketing campaign.

MACHINERY AND PLANT

A FACTOR of great importance to British manufacturers of machinery and machine tools is the steady progress of local industry in South Africa. During the war the chief source of manufactured goods—Great Britain—was largely cut off. The increase in the price of goods from oversea and the lack of certainty in obtaining supplies resulted in the need for home production. Later, the industrial policy of the Union Government was to encourage in every way the development of home industry. The revised Customs tariff of 1925 and subsequent amendments were framed with this end in view.

South African Industries.—Industrial developments in South Africa consequently progressed very rapidly. In 1915-16 the industrial census revealed 3,998 establishments engaged in factory and industrial production. By 1926-27 the figures had risen to 7,172, including Government establishments. Between the censuses of 1923-24 and 1924-25, the increase in the number of establishments was 94. The total fell to 7,085 in 1925-26, but increased to 7,172 in 1926-27.

According to the 1926-27 census, the value of machinery, plant, and tools in factories was £36,573,158, compared with £16,000,000 in 1916. The total number of persons employed was 202,689, the value added in process of manufacture

£47,507,685, and the gross value of output approximately £100,000,000.

This development merits the closest attention from British exporters of machinery. The growth in demand is well illustrated by the increased imports of machinery and machines. The import trade is largely in the hands of British firms, but strong competition is experienced in agricultural machinery and implements from the United States, Canada, Denmark, and Germany; and in electrical machinery and equipment, office machinery, engines, and printing and bookbinding machines from the United States.

Trade Openings.—Cream and other separators for dairying mainly come from Sweden and Denmark, and binders, reapers, mowers, ploughs, and harrows from the United States and Canada. Nearly 50 per cent. of the spades imported come from Germany. The United States supplies the majority of electric batteries, some 15 per cent. of the electric motors and transformers, 20 per cent. of the oil, petrol, and spirit engines, and practically all the typewriters, adding and calculating machines, cash registers, and other office equipment. In all these lines British manufacturers therefore have openings for increased trade.

Import Tariff.—No import tariff is levied on machinery, apparatus, appliances, and implements for agricultural purposes, or fixed plant and machinery for factory installations. Other machinery when imported from the United Kingdom is also admitted free of duty, foreign imports being liable to a duty under the maximum tariff of 3 per cent. or 5 per cent. *ad valorem* according to the class. The tariff does not, therefore, enter largely into the problem of marketing, though an increased measure of Imperial Preference would be of considerable assistance to British exporters, and would not hinder the industrial development of South Africa.

Industrial Machinery.—The chief openings for industrial machinery are in connection with the leather and leatherware, wood-working, clothing, confectionery, engineering, and

metal-working industries. A large number of factories are in course of construction or are about to be erected for the manufacture of clothing, hats and caps, hosiery, and wire and other metal manufactures. Good openings are to be found for refrigerating machinery, and constructional machinery for buildings is in steady demand.

Manufacturing industries which will probably expand in the near future, and consequently provide an increased demand for machinery and plant, are those engaged in the manufacture of asbestos products; boots, shoes, and other leather goods; food products, such as bacon, hams, butter, cheese, condensed milk, and jams; canned fruits, meat and fish; cement; chemical products, confectionery and chocolates; cotton ginneries; earthenware and pottery; furniture; iron and steel goods; paints, colours, and varnishes; paper bags, millboards, and packings; tanneries; and woollen blankets, rugs and tweeds. Recent reports state that manufacturing industries remain, in general, well employed, and that prospects are satisfactory.

Machine Tools.—In the machine-tool market increased competition is being experienced from the United States and Germany. British manufacturers supply about two-thirds of the total of imported products in this class, and have a strong hold on the market for heavy and highly specialized plant. In tools of good design and quality more competition is being experienced from German sources. Both American and German agents are very active, and are securing a large share of the business. No local competition is to be found in these lines. Demand is largely from the South African Railways and Harbours Department, the mining industry, tramway workshops, engineering shops, and manufacturing establishments. The total value of machine tools imported on private account in 1928 approximated £112,000, of which the United Kingdom supplied some 75 per cent.

CHAPTER III

In selling goods it is impossible to view South Africa as one unified market, capable of being worked from one centre. The area of approximately 472,500 square miles contains less than 2,000,000 Europeans, who constitute the buying community. This white population is not concentrated in the large towns, but is scattered throughout the country. There are only two towns—Cape Town and Johannesburg—with more than 100,000 inhabitants, and these are nearly 1,000 miles apart. Only 14 towns have over 10,000 inhabitants, the total population of these being less than 600,000.

Some 70 per cent. of the white population thus live outside the chief urban centres. Exporters must, therefore, view South Africa as many markets, large and small, scattered over the country. They are best reached through the daily Press in the large centres, and the various good general media in the outlying areas. Of the European population, more than half are of Dutch extraction. Most of these are interested in and connected with the farming industry. They are not, therefore, to be found in the large centres, but in the smaller towns, the "dorps," and on the farms.

RAILWAY AND MINING EQUIPMENT

THE value of the South African market for metals and metal manufactures is clearly shown by the trade returns for 1928. Imports of metals, metal manufactures, machinery, and vehicles had a total value of £22,746,022, an increase of £724,000 over the value of similar imports in 1927. The importance of this class of imports is shown by the fact that, according to groups, it heads the list of imports.

The high value of imports of metals and metal manufac-

tures is partly due to the rapid industrialization of the Union. This, together with the progress in the mining, agricultural and pastoral industries, has led to a steady development of transport facilities throughout the country. The value of locomotives imported in 1928 was £215,737, and in 1927, £494,491. Demand for all kinds of railway material—locomotives, heavy and light rails, iron sleepers, cranes, lifts, waggons, saloons, etc., is constantly increasing. Tenders are constantly being invited by the South African Railways and Harbours Department for mild steel plates, electric overhead travelling cranes, steel body frames, main line saloons, electric goods lifts, ash handling plant, etc.

Railway Material.—The demand for railway material and equipment is very heavy. Very large orders are placed by the South African Government, but many of these contracts have been secured by German and Belgian firms. The placing of these orders outside the United Kingdom was the subject of much comment both in South Africa and in this country, particularly as British railway material had been acknowledged as giving better service. But the prices tendered by Continental firms were so much lower than those of the British tenderers, in one case by nearly 15 per cent., that it was generally admitted that the Union Government had no alternative but to take the foreign tenders.

During 1928 and 1929, however, British manufacturers were much more successful in their tenders. The satisfaction felt was plainly voiced by the *South African Mining and Engineering Journal* in January, 1928, in the following words:

"At last a British firm, the Metropolitan Carriage, Waggon, and Finance Company, of Birmingham, has broken the monotonous series of South African railway orders to Germany by securing a contract for the supply of 50 second main line coaches at a cost of £170,000. The news has naturally given great satisfaction in commercial and industrial circles, and the more because, although there was keen competition from Continental firms, the British tender succeeded purely on its merits."

This success was followed by the North British Locomotive Company obtaining an order for 29 locomotives. This order originally formed part of a large contract for which the quotation of a German firm had been successful; but it is understood that the Government called for new tenders in order to give the British tenderers a chance to lower their quotations. This was very welcome news to British manufacturers. Considerable purchases of new rolling stock are contemplated by the South African Railways Administration in the near future.

Mining Equipment.—The progress of railway transport is closely linked up with developments in the mining industry. As new areas are opened up, railways and roads are required. One result of this has been an increased demand for road construction material and machinery, for it is essential that roads with good surfaces link up the mines and railhead or port. Developments both on the Rand and in other mining areas have resulted in an increased demand for mining equipment of all kinds. New machines, parts, rockdrills, small light machines, etc., are constantly required.

It is absolutely essential that British manufacturers of mining machinery and equipment should have capable representatives in South Africa, men with sufficient technical knowledge to be able to report fully upon the needs of the market. During the past few years, German manufacturers have been making every effort to regain their pre-war trade in the Union, particularly in the railway, iron and steel, machinery, and mining fields. They have sent out highly trained men to investigate market conditions, and have thus been kept in the closest touch with every phase of development.

British goods have a very firm hold in the markets for metal manufactures in the Union, but there is plenty of room for expansion. Of the total imports of metals, metal manufactures, machinery and vehicles into the Union in 1928, 47·4 per cent. came from the United Kingdom.

Co-operative Advertising.—The future outlook in the

transport and mining fields is very bright, and British manufacturers will find there an increasing market for their products. But goods will not sell themselves. Apart from the necessity for efficient representatives and selling methods, the subject of advertising is of vital importance.

CHAPTER IV

A vital preliminary to every selling campaign is a thorough study of local conditions. Without that study a considerable sum of money will probably be lost; wasteful expenditure in advertising is certain to be incurred; and sales possibilities may be ruined through overlooking such fundamental factors as climatic conditons, transport difficulties, or the racial composition of the population in a certain area.

It is not at all uncommon to hear South Africans complain that their market has been greatly neglected by British manufacturers during the last few years. The result has been that United States and German manufacturers—who have sent representatives to South Africa to make an exhaustive study of the market and its requirements—have gained a commanding position in many lines.

MOTOR VEHICLES

The rapid development of the market for motor vehicles of all kinds offers great opportunities to British manufacturers, provided that their products are suited to the needs of the market and are given the publicity which is absolutely essential to success. At present the market is mainly in American hands, although British imports show a steady increase. This is due to the careful cultivation of the market by American firms, particularly to the extensive publicity campaigns carried out during the post-war period.

This publicity has not been confined to the Press, for American makes have been brought direct to the public notice in motor shows and by means of tours throughout the Union. Two examples of such tours were the Cape to Cairo expedition of a Chevrolet sedan car and one-ton truck, and the travelling motor show organized by General Motors (South Africa)

Limited; the latter made a 5,200 miles tour of 103 towns and villages in the Union, one model of each of 33 cars and 17 trucks being included in the tour. Such tours create great interest and are invaluable aids to sales. Also, in order to cope with the growing demand, the General Motors and Ford companies have established assembling factories at Port Elizabeth. Unless British manufacturers adopt methods similar to these, it will be almost impossible for them to compete successfully with American and Canadian firms.

Expanding Market.—The rate at which the market is expanding is clearly shown by sales, licence, and registration returns. Between 1922 and 1927 the number of motor-cars and taxis increased at the rate of 25 per cent. each year. Sales during 1928 totalled 26,249 cars, 5,255 trucks, and 6,637 motor cycles, representing an increase over 1927 figures of 18 per cent. in cars and 24 per cent. in trucks, but a decrease of 7 per cent. in motor cycles. The total number of motor vehicles in the Union at the end of 1927, according to motor vehicle census statistics, was 129,094, as compared with 111,868 at the end of 1926. At the end of 1928, the total was 158,838, consisting of 113,002 motor-cars, 11,672 trucks and omnibuses, and 34,164 motor cycles. The percentage increase in registrations over 1927 was 17·6 in cars, 31·19 in trucks and omnibuses, and 5·93 in cycles.

Market Requirements.—The market is mainly for cars of between 15 and 30 h.p. Registration figures bring this fact out very clearly: of the total in 1927 more than 50 per cent. were between 20 and 24 h.p., 15 per cent. from 15-19 h.p., and 12·8 per cent. of 25-29 h.p. The percentage of cars under 20 h.p. is slowly increasing, mainly owing to the improvement in road surfaces. But general conditions have resulted in a demand for a heavier car than is common in Great Britain, and also for one capable of tackling the majority of hills on top gear. It is here that the American car has predominated. Drivers in South Africa have become so used to the big-engined American car, with its comparatively low top-gear

ratio, that they will not be bothered with a car employing a smaller engine involving a necessarily greater use of the gearbox. It is therefore very necessary for British manufacturers to meet the demands of the market, and to familiarize the South African driver with British makes. The poor roads in many districts also necessitate a strongly built car capable of standing rough going; the three-point suspension, both for the engine and the gearbox, is advisable to accommodate to excessive whip in the frame when travelling over bad surfaces. A somewhat higher clearance than is common in Great Britain is also required.

Trade Figures Analyzed.—Trade figures for 1928, when analyzed according to price, show that demand is mainly for the comparatively low-priced car. Imports of motor-cars during the year numbered 18,013. Of these 17,769 were valued at under £400 each, 210 at £400 to £600 each, and 34 at over £600. Second-hand cars to the number of 307 were also imported. Imports of motor trucks and vans numbered 199, valued at £41,980, and of motor charabancs and omnibuses 6, valued at £4,098. Motor cycle imports numbered 6,637, valued at £207,591. The importance of the local body-building industry is well illustrated by the imports of chassis. The number of motor-car chassis imported, for bodies to be built in the Union, totalled 8,236, with an aggregate value of £582,171; and of other motor-car chasssis, one, valued at £62. The increase in the value of chassis imported coincides with the growth of the body-building industry in South Africa, and British manufacturers should seriously consider the selling value of an extension of the practice of having the bodies of their cars built in the Union. Where bodies are built in Great Britain, care must be taken that the enamel will withstand the hot weather.

Road Motor Services.—The market for lorries and public passenger vehicles is rapidly expanding. The country areas are being opened up by the road motor services of the South African Railways and Harbours Administration, and services

now exist in more than 50 districts. These services in 1927 carried 877,432 passengers; 52,069 tons of goods, such as butter, eggs, poultry, vegetables, fruit, household requirements, and farm implements; and 393,189 gallons of cream. The great strides made in road transport are clearly illustrated by the increase in the number of motor vehicles employed by the Administration from 90 at the end of January, 1927, to 241 at the end of January, 1928. The excellent openings for British vehicles should not be ignored; the trend is towards the use of vehicles with a net carrying capacity of 10,000 lb.

Motor Tractors and Cycles.—The use of motor tractors is steadily growing. The country is particularly suited to tractor farming, but the farmers must be educated in the use of the machines if they are to realize their value in reducing costs of production. In the market for motor cycles, British makes have a strong hold, although the heavier American cycles are in good demand. Aerial transport is rapidly developing, both for passengers and for commercial purposes, and provides good openings for British planes.

In selling campaigns, the question of price, as indicated in the trade returns analyzed above, is of primary importance. The method of selling by time payments is being used with advantage, and is likely to extend in the future. The question of agents is of great importance, and in this respect it must be remembered that, owing to heavier overhead costs, the agent in South Africa expects a considerably higher commission than is common in Great Britain.

CHAPTER V

The growing prosperity of the Union has led to a decided improvement in trade prospects. In regard to tariff protection, the British manufacturer must of necessity be able to compete in the open market with the foreign producer, and not rely on tariff preference in order to sell his goods. The most important form of preference still exists—the preference on the part of the British inhabitants of South Africa for goods of British origin.

The importance of a settled political atmosphere is realized by all traders who know the market. The agitation over the question of the status of the Dominion, which culminated in the Flag Bill, seriously disturbed the normal channels of trade. Reports from South Africa were so discouraging that orders were cancelled and contracts held up. But the situation has immensely improved since the Flag question was settled. Political matters, though still of considerable influence, have ceased to interfere with the free conduct of trade, and both British and Dutch inhabitants have realized that the economic development of the country is retarded by unsettled political conditions.

ELECTRICAL EQUIPMENT

The progress made in the provision of electric power is an outstanding feature of South Africa's development during the post-war period. The Electricity Act of 1922 was the outcome of both Government and public recognition of the vital importance of the provision of cheap electric power in the development of primary and secondary industries. The Electricity Supply Commission, a public utility corporation backed by the Government, was formed in 1923, its purpose being to establish or acquire undertakings for the generation of electric power, and to sell electricity to consumers at cost.

South Africa now has a number of large power stations, such as the Witbank, Colenso, Congella, and Salt River stations; smaller stations are also in operation. The electrification of railways forms part of the general scheme. The Cape Town suburban lines and the line from Glencoe Junction to Pietermaritzburg have been electrified, and the system is to be extended.

These developments are of the greatest importance to manufacturers of electrical machinery and equipment in the United Kingdom. The demand for batteries, dynamos, generators, transformers, motors, electric lifts, cable and wire, heating and cooking apparatus, meters, insulators, globes, bulbs, and flashlamps has shown a rapid growth. British branded electrical products have a high reputation in the market, and the enterprise of British electrical firms is a most satisfactory feature of Anglo-South African trade. Good publicity methods are a vital necessity, and participation in all electrical exhibitions is essential to success.

Preferential Rebate.—British products have a firm hold on the market for both heavy plant and smaller equipment, and good openings exist for increased trade. Competition, particularly from the United States, is very keen. A factor of considerable value to British exporters is the preferential rebate granted on the majority of electrical lines. The tariffs levied on imports are not high, and British machinery, apparatus, appliances, implements, and material used in connection with the generation, storage, transmission, and distribution of electric power, electricity meters, electrical cooking and heating appliances, electric irons, electric lamp bulbs and globes, etc., are admitted at the minimum duty.

Import Figures.—The steady increase in the demand for electrical goods is clearly shown by the import figures. Imports of primary batteries increased in value from £52,106 in 1926 to £114,948 in 1928; of secondary batteries from £59,864 to £81,779, of dynamos and generators from £28,364 to £66,537; of transformers from £61,622 to £106,268; and of

motors from £122,363 to £138,391. In all these lines British imports show an increase, but the value of imports from America is also growing. Openings exist for a considerable expansion in the British share of the trade, particularly in batteries, where American products have the greater part of the market. German and Dutch competition is of importance in certain goods such as transformers and motors.

The market for electric lifts is largely in British hands, and the greater part of the cable and wire imported is also obtained from the United Kingdom. Total imports of electric heating and cooking apparatus increased from a value of £35,506 in 1925 to £118,358 in 1928. Imports from the United Kingdom rose in value from £23,927 to £38,018, but Canadian imports during the same period increased from £1,325 to £44,231, and American and German imports have also grown very considerably. Electric meters and insulators are mainly supplied by British firms, competition being chiefly from Germany and the United States.

Household Appliances.—The demand for electric hand lamps is steadily growing, but American and German makes are getting most of the business. The total trade in 1928 was valued at £20,977, and British imports were only worth £2,143. A British firm manufacturing a reliable globe should do well in this market. The name of the make must be brought direct to the notice of the public.

It is of the greatest importance that representatives should keep in close touch with developments in the provision of electric power and with all tenders called for throughout the Union. Extensions in areas of supply result in a great increase in the demand for globes, bulbs, and every kind of household heating, cooking, and other appliances. Tenders are constantly being invited for the supply, delivery, and erection of municipal electric lighting plant.

Cape Town makes a steadily increasing demand for household electrical appliances. In Durban the suburban demand for electric supply is growing rapidly, and fresh areas are

being wired. The use of electric cooking and heating apparatus is firmly established; electric stoves and water heaters are being installed in increasing numbers; and the demand for electric refrigerators is rapidly growing. In Port Elizabeth the consumption of electricity for purely domestic purposes shows a great increase, and water heaters, stoves, etc., are steadily being connected.

CHAPTER VI

Manufacturers wishing to enter the South African market must exercise great care in the choice of selling agents. A personal visit to the country is always advisable; otherwise the manufacturer should get in touch with a reputable firm either domiciled in, or with connections in, South Africa, and get that firm to place him in communication with a suitable organization.

HARDWARE AND CUTLERY

The market for hardware and allied goods needs very close attention from British manufacturers if they wish to expand, or even to retain, their share of the trade. Industrial and tariff developments should be watched. Requirements of Government and other public bodies are of great importance, recent tenders invited being for general and domestic hardware, builders' ironmongery, cutlery, fencing material, galvanized iron and piping, and paint. Low price is a dominating factor, the competition of cheap Continental and American products being very keen. German agents have been cultivating the market very carefully during the past few years. Local competition in hardware goods, except wire fencing and netting, is not of much consequence at present, but it will certainly increase in the near future.

Import duties are levied on the majority of hardware and allied lines, and constitute a severe handicap. Imports of British origin are admitted at the minimum rate, but no preferential treatment is granted to hardware. Cutlery (not plated), enamel-ware, and hollow-ware from the United Kingdom are subject to a duty of 15 per cent. *ad valorem*, the maximum rate being 20 per cent.

Distribution Methods.—The method of distribution is of primary importance in the case of domestic hardware. The consumer is best reached through the local storekeeper, who knows the peculiarities of the market and is in constant touch with the buyer. Reasonable credit should be extended to him in order that stocks may be kept on hand.

Domestic Hardware.—The demand for domestic hardware is steadily growing, and the market is largely in British hands. Cast-iron kettles and cooking utensils, metal bedsteads, fenders, fire-irons, and grates have a good sale. Stoves and ranges are obtained chiefly from the United Kingdom, but American and Swedish lines are obtaining an increasing share of the trade. Household lamps and lanterns have an excellent sale, imports in 1928 reaching a total value of £78,919, but the market is largely in German hands.

Enamel-ware and Hollow-ware.—Enamel-ware and hollow-ware are wanted, and the British share of the trade is capable of expansion. Competition is mainly from cheap German lines, of which very considerable quantities have been imported in recent years. Germany's share of enamel-ware imports is much larger than that of the United Kingdom. In 1928, out of total imports valued at £154,155, goods worth £77,999 came from Germany, an increase of £20,000 compared with 1927; British imports, at £39,097, showed a small decrease. Hollow-ware is obtained mainly from the United Kingdom. British sales of aluminium-ware are fairly steady, while German imports have decreased heavily in recent years. The demand for quality lines is of value, and tends to improve.

Plate and Plated Ware.—Plate and plated ware are in keen request, the trade being almost entirely in British hands. Cutlery (not plated) is also largely imported from the United Kingdom, whose proportion of the trade shows a steady increase. In 1928, total imports were valued at £250,644, of which this country was responsible for £144,262. Competition from Germany and the United States is very keen. Im-

ports are steadily expanding, and the market presents excellent openings.

Builders' Hardware.—The great activity in building throughout the Union is indicative of the steady development that is taking place. The demand for builders' hardware is growing, and provides good openings for British products. Care must be taken that the lines are suited to local requirements. Locks, keys, bolts and hooks for doors and windows, etc., are obtained mainly from the United Kingdom, but competition from German and American lines is very active. The inquiry for steel windows is growing rapidly. Imports, valued at £93,263 in 1928, are almost entirely satisfied by United Kingdom products.

British imports of building cement have suffered as a result of increased local competition, and also from the competition of cheap Continental cement. Paints, colours, varnishes, and stains are in excellent demand, but the British sales are falling owing to increased local and foreign competition. Distempers and wallpapers are wanted.

An extensive demand exists for flat and corrugated galvanized sheets, annual imports approximating a value of £1,000,000; this trade is almost entirely in British hands. Screws and washers are mainly obtained from the United Kingdom, whose share of the sales of bolts, nuts, and rivets has, however, fallen considerably in recent years. Competition is chiefly from Continental countries and the United States. Cheap Continental goods dominate the market for wire nails.

Wire Products.—In regard to wire, wire manufactures, and fencing material British lines are losing ground as a result of competition from cheap Continental products and local manufactures. Fencing material (not wire) is obtained mainly from Belgium, and plain and barbed fencing wire from Germany. The market for barbed wire is expanding, but the British share shows a decrease. The prospects of increased business are distinctly poor unless British products can com-

pete on a price basis. Cheap German lines have obtained the greater part of the trade in wire netting, but the general recognition of the superior quality of British netting presents openings.

Agricultural Implements.—Implements and tools are in general demand. British products have a fair share of the sales, which should be increased in the future. Competition is chiefly from the United States in lifting jacks, mechanics' tools, and wheelbarrows, from Germany in pickaxes, and from Canada in shovels. Kaffir picks and hoes for agricultural purposes are obtained principally from the United Kingdom. In agricultural implements German competition is keen in spades, and American in sprayers and sprinklers. Canadian competition is of growing importance.

CHAPTER VII

A well-balanced advertising campaign in South Africa should include outdoor publicity and other forms of reminder aids, as well as the Press. Cinema advertising should not be ignored. The variety theatres are run on the half-vaudeville half-cinema system, and advertising slides are shown before the performance and between the two sections. Mail orders have a distinct appeal, particularly in the country areas; care must be taken that the name of the local agent or distributor is clearly shown on all mail order literature.

GROCERIES AND CONFECTIONERY

The market for imported groceries and confectionery is of considerable importance. Good branded lines which are familiar and sell well in Great Britain have every chance of success if properly marketed, for many of the people are of British birth and prefer food products which they had at home. The growing purchasing power of the coloured races is a factor of great importance, and careful attention should be given to labels on lines intended for their consumption.

Sauces, Pickles, Mustard.—An excellent market exists for imported sauces, particularly in the back-country districts, annual imports of sauces and chutneys being valued at some £50,000. Competition in imported lines is chiefly from American products.

Pickles imported in 1928 were valued at £20,847, the British share being worth £18,823. This market is of distinct value to British manufacturers interested in export markets. Local competition is of importance, but the local producer is hampered by the absence of a bottle-manufacturing industry in South Africa. English pickles are in strong request, demand being largely for the unsweetened variety. Lines

must be branded, and the brand brought to public notice by well-directed publicity.

The markets for imported mustard and custard powder are in British hands. Dry mustard packed in tins is generally preferred. In 1928 imports of mustard were valued at £26,010, and of jelly, custard, and pudding powders at £25,081, the British share being £24,998 and £24,527 respectively. There is a brisk demand for good table salt, imports being valued at £12,825 in 1928; this trade is almost entirely in the hands of British firms, imports from the United Kingdom being worth £12,362. Good openings exist for a well-advertised line of British baking-powder. Of total imports valued at £63,714 in 1928 the United States supplied goods worth £62,450. Local products are making headway, largely owing to their cheapness.

Jams and Jellies.—Superior quality jams and marmalades find a ready sale, particularly in the large towns, where demand is mainly for 1-lb. jars of well-known lines. Jellies and jelly crystals are wanted, but there is strong local competition. Imports of jams and jellies in 1928 totalled £14,664 in value, of which the British share was £13,012. Golden and maple syrups have a very good sale; imports in 1928, almost entirely from the United Kingdom, were valued at £86,348.

Cereal Products.—Branded cereal lines have an excellent and growing demand, and British manufacturers will find the market well worth close investigation. The market for imported biscuits is very small; local products control the trade, except in high-quality lines. Wrapped cream cheese has a ready sale; the market is keenly competitive, but there is a good opening for a well-advertised British line. Imports in 1928 were valued at £37,056, Holland, Canada, and Switzerland being the principal suppliers.

The consumption of tea has greatly increased in recent years, but imports are mainly in bulk. The demand for imported packets or tins of tea, coffee, and cocoa is not very large.

Coffee extracts have a limited sale. The market for extracts and essences for food presents openings; imports in 1928, valued at £44,491, were almost entirely from the United Kingdom.

Prepared Meats.—Good quality hams, given sufficient publicity, find a fair demand; imports in 1928 were valued at £19,226, the United States supplying goods worth £5,448, and the United Kingdom £6,257. Bacon is mainly obtained from the United States. There is a small market for preserved poultry and game and tongue. Good-quality lines packed in glass containers will find a sale. Meat pastes are wanted, but there is strong local competition in the cheaper lines; British goods have the greater share of the trade in imported products. A small quantity of soup is imported. Imports of other preserved meats, mainly from the Argentine, were valued at £120,943 in 1928.

Fish Products.—The market for dried, cured, and other preserved fish is of considerable importance. In 1928 imports of dried and cured fish were valued at £63,243, of which the share of the United Kingdom was £49,286. Other preserved fish imports reached a total value of £348,119; competition in these lines is mainly from Norway and Canada. This market is worth closer attention from British producers; a high-grade tinned salmon with a good brand will find a sale. Bottled and tinned fruits are chiefly imported from the United States and France, total imports in 1928 being worth £32,172.

Chocolate and Confectionery.—Chocolate and confectionery have a very good sale. Local competition is very keen, and there are a number of foreign lines on the market. British specialities have a ready sale, and British manufacturers should consider the value of opening a local factory. A cheap line of wrapped toffees, packed in attractive containers, will command an excellent market. The type of container is of vital importance in confectionery and other food lines, not only from the point of view of appearance, but also with regard to the use of the container after the contents are con-

sumed. Containers with smooth edges, which can be used for such domestic purposes as holding tea, coffee, etc., add greatly to the selling value of the product.

Imports of chocolate confectionery in 1928 were valued at £153,925, of which the British share was £86,661; competition is mainly from Switzerland, Canada, and Holland. Crystallized fruits imported were worth £3,253. Imports of other manufactured sweets totalled £130,328 in value, the United Kingdom supplying some two-thirds.

CHAPTER VIII

A co-operative advertising campaign is well worth very serious consideration. Such a campaign is not an expensive undertaking, for it is possible to run a co-operative scheme to cover all the leading papers in the chief towns for a total cost of some £3,000. The amount of interest created by a co-operative scheme would well repay the expenditure. The goodwill to buy British goods is there, but unless that goodwill is exploited it will not materially assist sales. British products have a reputation for quality second to none—but that reputation alone will not sell them. The goodwill and reputation must be capitalized by exerting every effort to "sell British" on its merits. The characteristics of the country and of its inhabitants must be carefully studied. It must be realized that, generally speaking, what is suitable for Great Britain is not suitable for South Africa. Climatic conditions are different, distances between industrial centres are much greater than in England, and the mode of living, business methods, and general ideas of the people are very different from those of the inhabitants of the home country.

POTTERY, GLASS, AND GLASSWARE

British manufacturers of china, porcelain-ware, earthenware, stoneware, tiles, glass, and glassware will find a good market in South Africa, but one that requires careful attention. Competition is very keen, both from local goods—home production is steadily developing—and from low-priced Continental wares. The market is essentially a price market. Preferential tariff rates are limited to empty glass bottles, polished glass, and plain, clear sheet glass; the British exporter consequently receives little assistance in this respect.

China and Porcelain.—The market for china and porcelain ware is of growing importance, imports increasing in value from £76,537 in 1927 to £187,403 in 1928. Although the British share of this trade was worth £98,634 in 1928, compared with £35,634 in the preceding year, competition from cheap German, Czechoslovak, and Japanese products was felt. Good quality wares command a steady sale, but demand is mainly for second-class lines, for there is considerable breakage in transit, and native servants are notoriously careless.

Earthenware and Stoneware.—Imports of earthenware and stoneware decreased heavily in value in 1928 compared with 1927, falling from £200,711 to £81,767. A satisfactory feature of this trade is the firm hold of British products. Germany and Czechoslovakia are the chief foreign competitors. The local production of kitchen and other household ware is small, but will probably be of more importance in the future.

Sanitary ware is in request. The trade is almost entirely in British hands. There is a steady sale for quality lines. Local production of glazed lavatory basins, water-closet fittings, etc., is increasing, and local products are slowly becoming more important competitors. The trade in porcelain insulators is of importance, and presents openings for British lines. American competition resulted in a serious decrease in the British share of the trade in 1927, but in 1928, while total imports fell, imports from the United Kingdom increased, while imports from the United States declined. Porcelain jars and crucibles and other assay apparatus are chiefly obtained from the United Kingdom.

Tiles.—The local output of tiles, particularly of roofing tiles, has grown very considerably in recent years. The high price of corrugated iron has resulted in a great increase in the demand for tiles for roofing purposes. British manufacturers have to contend with increasing competition from France as well as from South Africa itself. The trade in flooring, paving, and wall tiles is worth close attention. Imports from the

United Kingdom have steadily fallen since 1925, while imports from Germany have grown rapidly.

A good demand exists for imported building cement, due to the great activity in building. Local production, however, is increasing. Imports from the United Kingdom receive a tariff preference of 3d. per 400 lb; the value of British imports rose in 1928, but the market has been largely captured by Continental countries.

Glass and Glassware.—The glass industry of the Union has not been developed to any extent. Competition from local products is, however, likely to increase in the future; the sand resources of the country are reported to be suitable for the manufacture of all but the finest glassware. Low-priced Continental products have obtained a firm hold on the market.

An expanding sale exists for glass bottles and jars, largely a result of the increased local production of jams, pickles, sauces, etc. The British share of the trade is declining, German and American products obtaining a stronger hold on the market. Plate glass is in strong demand, and the United Kingdom has a firm hold on the trade. It is significant, however, that imports from Belgium are steadily increasing in value. The British share of the trade in window and other glass is falling, imports from Belgium being of growing importance.

Good quality glassware has a steady sale, but, as is in the case of chinaware, breakages result in demand being mainly for second-class lines. Imports of glassware (excluding bottles, jars, and glassware for laboratory use) rose in value from £148,971 in 1927 to £150,541 in 1928, but British sales are feeling the effect of competition from cheaper German and Czechoslovak products. Germany holds the leading position in the import trade.

CHAPTER IX

When trading with South Africa it must be appreciated that the market is largely a price market, and that low selling prices are a fundamental necessity in many lines. The demand for quality products is, however, of considerable importance, and the reputation enjoyed by British goods of this class tends to overcome the disadvantage of higher prices. The period of prosperity through which the Union is passing should result in an increasing sale for better quality lines.

PAPER AND STATIONERY

No paper is manufactured in South Africa. Imports of newsprint, both flat and in reels, have steadily expanded. The United Kingdom has entirely lost her hold on this trade, supplies being obtained almost wholly from Canada, Sweden, and Norway. The growth of the local printing industry has led to an increased demand for other printing paper. British firms have a strong hold on this trade, but competition from cheap Continental products is causing the British share to decline.

Heavy commercial papers are in good demand. The import trade in wrapping paper has expanded in recent years, but Canadian and Scandinavian firms have obtained a larger share of the trade, mainly at the expense of British lines. The use of kraft paper for such purposes as sugar-bags is rapidly extending; owing, however, to strong competition from Canada and Scandinavia, the opening for British goods is poor. Vegetable parchment paper, obtained mainly from Belgium and the United States, is imported for use in creameries.

Wallpaper.—The trade in imported wallpapers, valued at some £40,000 per annum, is almost entirely in British hands,

though German and other foreign firms have tried to enter the market. The demand for better quality wallpapers shows a tendency to grow, and British manufacturers should cultivate the market. Close attention must be given to sample books and to obtaining the co-operation of dealers. There is no Customs duty on samples intended for indenting purposes or on sample books for importers.

Bags and Boxes.—The decrease in imports of printed and unprinted bags and cardboard boxes is the result of developments in the local production of these lines, and the outlook for imported lines is poor. Wax cartons and cardboard discs for milk bottles are obtained from the United Kingdom.

Boards.—Developments in the local box-making industry have resulted in an increased demand for cardboard, linenboard, and strawboard. The trade is divided between the United Kingdom, Sweden, Holland, and Germany. Holland supplies the greater part of the strawboard imported. German competition is of growing importance. The demand for these lines should expand in the near future.

Books.—A valuable market exists for printed books and music, a trade which is controlled by goods from the United Kingdom. British firms also supply the greater part of the atlases, charts, labels, tickets, address tags, price lists, catalogues, and other printed matter imported. The import trade in these lines, and also in account books, delivery books, and similar lines, is feeling the competition of local products, competition which will increase in the future.

Boxed Stationery.—Boxed stationery has a good market, demand being mainly for medium quality lines; an expanding tendency is shown in the desire for better quality goods. Office stationery of medium and cheap grades is in strong request, and Christmas cards, invitation cards, post cards, and envelopes have a ready sale. Playing cards are obtained chiefly from the United States. Imported inks have a good sale.

Figures of imports in 1928 show that in the majority of paper and stationery lines values have increased, compared

with the preceding year. The growing value of the market deserves careful attention from British manufacturers of these products. In the case of certain goods, such as newsprint, printed, ruled, lithographed, and embossed matter, account, exercise, and copy books, labels, tickets, and address tags, advertising matter, loose leaf covers and binders, etc., a measure of tariff preference is granted to goods of British origin. Import duties on stationery are, in general, fairly high in order to give protection to the local products.

CHAPTER X

The value of a manufacturer's brand cannot be over-emphasized when dealing with the South African market. Branded goods of recognized standard quality will sell where unbranded goods of the same quality find but little demand. "Made in England" is an excellent selling factor, particularly when allied to a known British brand. A practice which should not be encouraged by British exporters is that of wholesalers in South Africa placing their own brand on British imported goods.

British manufacturers should remember that a valuable selling point for any line in South Africa is an intimation to the public that the raw materials used in manufacture are produced in South Africa. The possibility of getting the raw material from South Africa should consequently be carefully considered.

WIRELESS APPARATUS

The South African market for wireless apparatus must be very carefully investigated by exporters before they decide to enter it. Certain adverse factors exist, and until these have been overcome there is no likelihood of a great expansion in demand. It must not be concluded, however, that the market is not worthy of attention, for recent reports indicate a distinct revival of interest in broadcasting, and next winter is likely to show that the future holds considerable promise.

Broadcasting is of comparatively recent origin in South Africa. Regulations on the subject were published by the Government in August, 1923, and the first station was opened in Johannesburg on July 1, 1924. Since that date stations have been opened in Cape Town and Durban, and others are projected for Port Elizabeth and Bloemfontein. Broadcasting

is in the hands of the African Broadcasting Corporation, operating under Government licence.

The slow growth of interest is illustrated by the number of listening licences issued. By the end of 1925 the total was 10,767; this rose to 12,838 in 1926, 14,190 in 1927, and 16,710 by the end of 1928. The potential market is much larger, for the white population approaches 2,000,000, some 70 per cent. being outside the urban areas. Imports of wireless sets, valves, and component parts are not separately distinguished in oversea trade returns. There is no local manufacture.

Service Difficulty.—The great difficulty is that of service. The problem of atmospherics is serious, and owing to poor reception broadcasting has not yet obtained a hold upon the rural population. The three stations are widely separated, and are difficult to pick up except in their immediate areas. The result is that some five-sixths of the listeners are to be found in the Johannesburg, Cape Town, and Durban districts, the great majority within 30 miles of the respective stations. Until the revenue from licences improves it is difficult to see how better service in stations and programmes can be given.

The existing market is largely in British hands. The sale of American sets is growing, but English-made instruments are in a strong majority. The increasing attention paid to the market by American exporters is indicative of its possibilities for expansion, and emphasizes that the present is the time for British producers to make a detailed investigation of possibilities.

Receiving Sets.—Demand is generally for three and four-valve sets, which must be of the super-selective type, capable of picking up long-distance stations. The South African wants a set which will enable him to cut out the local station and pick up other stations in the Union a long distance away. Low price and low valve consumption are strong selling factors.

Super-heterodyne sets have a sale, for listeners are desirous of picking up European, American, and other oversea stations. Developments in the supply of electric power have resulted in

an expanding demand for the "all-mains" set. Openings for portable sets should expand, their outdoor use being of considerable selling value for both holiday and general use. The market for valves shows good prospects for sales of British products.

Publicity.—Packing and literature must receive close attention. As some 58 per cent. of the white population is Afrikaans, all instructions and selling matter must be in the Afrikaans language as well as in English. Wireless products should be advertised in the Press and from the broadcasting stations, which cater for an advertising service. Posters, hoardings on the railways, and cinema and screen advertising should not be ignored in a comprehensive campaign.

British manufacturers interested in the South African market should keep in close touch with developments in broadcasting. The erection of a central high-powered short-wave station would result in a great expansion in demand, particularly in the rural areas. Strong efforts are now being made to overcome local difficulties, and, providing they are successful, attention to the market will be well rewarded.

EMPIRE TRADE DEVELOPMENT

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AUSTRALIA
NEW ZEALAND
SOUTH AFRICA
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THE COLONIES AND PROTECTORATES

Fassett and Johnson Ltd. specialise in the marketing of Proprietary and Branded Goods, Pharmaceutical Preparations, Toilet Requisites, Grocery and Hardware Products in the above Territories.

Fassett and Johnson Ltd. offer to Manufacturers complete and efficient merchandising and selling organisation with intimate knowledge of the Trade and all local conditions and requirements in the above Territories.

Every Branch directed by capable and experienced Managers.

A large Outdoor Sales Force.

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SOUTH AFRICA : 15, Bree Street, Cape Town

SOUTH AFRICA

MARKET DATA

Area and Population.—The Union of South Africa has an area of 472,347 square miles (including Walvis Bay). It consists of the Provinces of the Cape of Good Hope, Natal, Transvaal, and Orange Free State. The areas and populations of these provinces are shown in the following table. The census of 1926 was of the European population only.

Province.	*Area.*	*Population.*		
		1921.		1926.
		European.	*Non-European.*	*European.*
	sq. miles.			
Cape of Good Hope ..	276,966*	650,609	2,132,110	706,137
Natal	35,284	136,838	1,292,560	158,916
Transvaal	110,450	543,485	1,544,151	608,622
Orange Free State	49,647	188,556	440,271	202,985
Union	472,347	1,519,488	5,409,092	1,676,660

* Including Walvis Bay, 430 square miles.

The estimated population in 1928 was 7,777,583, including 1,738,937 Europeans and 6,038,646 non-Europeans. Of the European population, some 58 per cent. are Afrikaans—*i.e.*, of Dutch descent.

The chief towns, and their total populations in 1921, and the European populations in 1921 and 1926, are as follows:

Town.	Population.		
	European.		Total.
	1921.	1926.	1921.
Johannesburg	151,836	170,741	288,131
Cape Town	114,110	130,568	212,997
Durban	58,085	70,883	151,642
Pretoria	45,361	54,336	74,052
Port Elizabeth	26,303	33,371	52,298
East London	20,374	23,210	34,673
Bloemfontein	19,367	22,695	39,034

Production.—The following table gives a comparative statement for the years 1925-26 and 1926-27 of the production of factories and productive industries, by classes. Government and local government undertakings and railway workshops are included in the statement.

Comparative Statement—Classes of Industry.

Class of Industry.	No. of Establishments.		Gross Value of Output.	
	1925-26.	1926-27.	1925-26.	1926-27.
			£	£
Treatment of raw material ..	118	109	1,849,916	1,960,997
Processes in stone, clay, earthenware, and glass	336	340	2,857,897	3,208,721
Working in wood	230	230	2,245,124	2,195,414
Metals, engineering, machinery, and cutlery	980	1,013	18,749,614	21,074,176
Food, drink, and tobacco ..	1,850	1,831	29,274,347	30,825,749
Clothing, textiles, etc. ..	718	714	3,583,694	3,970,325
Books, printing, etc.	343	353	4,373,888	4,810,695
Vehicles	914	935	2,197,755	2,074,184
Shipbuilding	10	8	50,695	50,942
Furniture, etc.	199	215	1,993,748	2,036,310
Drugs, chemicals, etc. ..	139	140	6,452,223	6,431,141
Surgical instruments, etc. ..	22	24	66,439	73,159
Jewellery, etc.	36	39	106,138	161,417
Heat, light, and power ..	162	163	4,961,644	5,411,526
Leather and leatherware ..	234	226	3,263,446	3,457,286
Building and contracting ..	751	784	8,781,843	9,413,308
Other industries	43	48	728,515	723,472
Total	7,085	7,172	91,536,926	97,878,822

Overseas Trade.—The tables below give details of imports and exports for the years 1926, 1927, and 1928.

IMPORTS.

Item.	1928.	1927.	1926.
	£	£	£
Merchandise:			
From overseas	72,218,778	67,482,715	65,572,342
From other countries in British South Africa:			
South African produce ..	3,077,421	3,064,109	1,569,205
Re-exports	205,596	225,723	235,893
Government stores	3,585,863	3,296,761	5,220,717
Specie:			
From overseas	5,567	18,872	143,379
From other countries in British South Africa	20,501	39,656	17,269
Total	79,113,726	74,127,836	72,758,805

EXPORTS.

Item.	1928.	1927.	1926.
	£	£	£
Merchandise:			
To overseas:			
South African produce ..	70,090,157	72,098,905	68,030,712
Re-exports	812,209	795,244	733,245
To other countries in British South Africa:			
South African produce ..	2,521,236	2,192,166	1,925,598
Re-exports	2,683,977	2,649,676	2,115,633
Bunker coal	1,647,510	1,995,714	2,275,348
Other ships' stores	202,344	196,310	186,822
Specie:			
To overseas	18,355,517	16,331,636	10,143,853
To other countries in British South Africa	106,096	80,370	93,192
Total	96,419,046	96,340,021	85,504,403

IMPORTS ACCORDING TO CLASSES.

Class.	1928.	1927.
	£	£
Foodstuffs	8,022,828	7,195,883
Ales, spirits, wines, etc.	82,275	618,566
Tobacco, etc.	93,241	99,463
Fibres, yarns, textiles, and apparel	20,271,718	18,223,802
Metals, metal manufactures, machinery, and vehicles	22,746,022	22,022,571
Minerals, earthenware, glassware, and cements	1,313,199	1,309,081
Oils, waxes, resins, paints, and varnish	4,272,346	3,977,389
Drugs, chemicals, and fertilisers	2,870,975	2,578,390
Leather and rubber and manufactures thereof	2,986,218	2,723,703
Wood, cane, wicker, and manufactures thereof	2,823,127	2,838,334
Books, paper, and stationery	2,435,060	2,332,062
Jewellery, fancy goods, sporting goods, etc.	1,783,463	1,744,650
Miscellaneous	1,629,659	1,548,285
Total	79,113,726	74,127,836

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SECTION VI

COLONIES AND PROTECTORATES

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SOUTHERN RHODESIA

The total value of all minerals mined in Southern Rhodesia during 1928 was returned as £4,448,311, as compared with £4,238,257 in 1927.

The values of the individual minerals produced in 1928 were :

	£
Gold	2,438,404
Chrome-ore	471,667
Coal	511,819
Asbestos	970,327
Mica	23,920
Other Metals and Minerals	32,174

As some indication of the exportable surplus of the principal products of Southern Rhodesia, the following figures show the value of such exports in 1928 :

	£
Tobacco	837,521
Maize and Maize Meal	357,385
Cattle	370,764
Hides (Ox and Cow, etc.)	304,884
Citrus Fruits	87,593
Gold (raw)	2,364,505
Asbestos	732,825
Coal	261,467
Coke	211,750
Chrome-ore	392,237
Mica	16,316

For further information apply to :

The Secretary
Office of the High Commissioner for Southern Rhodesia
Crown House, Aldwych, London, W.C. 2

I

SOUTHERN RHODESIA

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CHAPTER I

The steady progress of Southern Rhodesia during the post-war period has resulted in a rapid expansion in the demand for imported goods. Total imports in 1928 *were valued at* £8,435,000, *compared with* £7,574,000 *in* 1927 *and* £3,559,000 *in* 1923. *The British percentage of the import trade has remained fairly steady around* 59, *but competition, particularly from the United States and South Africa, is of growing importance. Careful attention to market requirements would result in an expanding demand for British manufactured goods.*

TEXTILES AND WEARING APPAREL

An excellent market exists for textiles and apparel. In 1928, total imports of fibres, yarns, textiles, and apparel (exclusive of boots and shoes, and sporting and athletic goods) were valued at £1,604,737, against £1,487,080 in 1927. The United Kingdom supplies the greater part of these goods, but her

manufacturers should keep in touch with the development of secondary industries in South Africa, for in 1928 imports of outer garments, cotton underclothing, boots and shoes, furnishing drapery, etc., from that country expanded considerably.

The preferential tariff treatment granted to products of United Kingdom origin is of great assistance to British exporters. This preference, compared with the duty on foreign goods, varies from 3 per cent. *ad valorem* on cotton and woollen blankets, to 6 per cent. *ad valorem* on cotton piece-goods and certain lines of apparel, 11 per cent. *ad valorem* on boots and shoes, and 16 per cent. *ad valorem* on bespoke clothing.

Piece-goods.—Cotton piece-goods are in growing demand, imports rising in value from £358,799 in 1927 to £391,211 in 1928. Sewing and knitting cotton is obtained mainly from the United Kingdom, but the British share declined in 1928, while imports from India expanded. The trade in cotton shawls presents openings for British products; at present imports are chiefly from Germany and Italy. Other cotton textile goods are supplied almost entirely by United Kingdom firms.

Woollen piece-goods have an increasing sale, imports in 1928 being valued at £29,592, compared with £21,510 in 1927. British lines control this trade, and also the trade in knitting and darning wool, other woollen manufactures and linen piece-goods and manufactures. Competition from South Africa is very keen in tents and tarpaulins and rope and rope-work. Thread and twine are obtained from the United Kingdom. Jute bags for coal, grain, and sugar are in strong demand.

The value of silk piece-goods imported in 1928 was £41,973, against £39,186 in 1927. Competition is chiefly from Japan, which has more than 50 per cent. of the trade. Imports of artificial silk piece-goods, valued at £3,592 in 1928, showed a slight expansion.

Blankets, Rugs, etc.—Cotton blankets, rugs, and sheets are in strong request, but the British share of the trade is very small; Belgium, France, Germany, and Holland are the chief sources of supply. Woollen blankets, rugs, and sheets have a fair sale, the United Kingdom having the largest share of the trade; keen competition is experienced from South Africa and Italy. Carpets, curtains, linoleum, and floorcloth are chiefly obtained from the United Kingdom. India supplies the greater part of the mats and matting imported.

Apparel.—British products have a strong hold on the market for apparel, but competition in certain lines is very active and merits close attention. Imports of outer garments in 1928 were valued at £340,731, of which the British share was worth £265,709, manufactures to the value of £26,440 being imported from South Africa. Hats and caps are in growing request. Cotton hosiery has a ready sale, and there is also an opening for mixed woollen and cotton and other hosiery. Exporters of hosiery should note the growing competition from the United States.

There is a strong demand for cotton underclothing. The United Kingdom is the chief supplier, but while the value of her imports declined in 1928, those from Japan and South Africa increased. Underclothing of wool and mixed wool and cotton has a small sale, imports being mainly from the United Kingdom. Haberdashery, millinery, and minor articles of attire are wanted. British products control the market, but German, Italian, and Swiss competition is increasing, and South Africa has a small share of the trade. Shawls of materials other than cotton are obtained from the United Kingdom and Italy.

Boots and Shoes.—Imports of boots and shoes reflect the rapid expansion in the boot and shoe industry in South Africa. The United Kingdom occupies the leading position in the trade, but her position is being seriously challenged by South African manufacturers. Imports of men's leather footwear were valued at £69,795 in 1928, of which the British and

South African figures were £37,359 and £31,465 respectively. In women's and children's footwear, however, the South African share is not so large. Slippers and other leather footwear are supplied mainly by the United Kingdom.

Rubber-soled and canvas walking and sporting shoes are needed, imports in 1928 being valued at £7,523; the trade is divided between Canada and the United Kingdom, Canada obtaining the larger share in 1928. Other sporting and athletic goods have an expanding sale, imports reaching a value of £15,451 in 1928. British products have an excellent reputation and satisfy nearly the whole of the demand.

CHAPTER II

British manufacturers interested in Southern Rhodesia as a market for their products have certain well-defined advantages over foreign competitors. Government purchases from oversea must always be of British goods, provided the price quoted is less than 10 *per cent. above that of competitive foreign products, and popular sentiment is always in favour of British articles which satisfy requirements, even if they are slightly dearer. In addition, where import duties are levied a preference averaging* 50 *per cent.* ad valorem *is accorded to imports of British origin.*

METALS AND MACHINERY

Local secondary industries are not of importance, activities mainly being confined to agriculture, ranching, and mining. Natural resources are rapidly being developed, and each year sees an increased demand for imported manufactured goods. The most valuable market for oversea products is that for metals, metal manufactures, machinery, and vehicles, combined imports reaching a total value of £3,067,753 in 1928, compared with £2,251,673 in 1926. The possibilities in regard to an expansion of British trade in these lines are very considerable.

Tariff Preference.—The majority of imports of metal goods of United Kingdom origin are admitted free of duty, a tariff of 3 per cent. *ad valorem* being levied on competitive foreign products. Certain British imports, such as stoves, ranges, electric lamps, cutlery (not plated), cash registers, calculating machines, and some general hardware lines, are liable to a duty of 9 per cent. *ad valorem,* the rate on similar products of foreign origin being 20 per cent. Motor-cars, motor bicycles, and pedal bicycles from the United Kingdom

pay 10 per cent., and from foreign countries 20 per cent. British motor trucks and vans are admitted free of duty, foreign imports paying 3 per cent. *ad valorem*.

Agricultural Implements.—Agricultural production, particularly of tobacco, has made great strides, partly owing to the increased use of modern machinery and implements. Careful attention to market requirements would result in an increased demand for British products. Imports of ploughs, harrows, and cultivators in 1928 fell in value as compared with the preceding year, but the United Kingdom share of the trade improved. Competition from the United States, Canada, and Germany is very keen. Binders, reapers, and mowers imported are largely of American origin, but British imports are increasing. The United States has a large proportion of the trade in planters and seeders. Other agricultural implements and machinery are principally obtained from the United Kingdom.

The use of farm tractors is rapidly extending, particularly in and near the tsetse fly belt in the north, where cattle cannot live. An adverse factor, however, is the high cost of petrol and paraffin. There is a good potential market for a gas producer plant capable of producing gas from wood, one which could be attached to tractors to supply the power required. Machinery for collecting and for crushing groundnuts is in demand, and there is a fair market for corn and flour milling machinery. Mixed farming is actively encouraged, and, as a result, the dairying industry is of growing importance. An expanding market exists for cream separators and other dairying utensils; separators are at present largely obtained from Sweden, and German competition is keen in many dairying lines.

Mining Equipment.—The mineral resources of the country are very extensive. A constant demand exists for plant and equipment for the coal, gold, chrome ore, asbestos, mica, and tin mines, and the need of machinery is increasing. The British share of the market for battery shoes and dies is

capable of considerable expansion. Buckets and tip trucks are mainly obtained from the United Kingdom. In other mining machinery there is keen competition from the United States.

Electrical Material.—The market for electrical machinery and equipment should develop considerably in the future. Imports of electric batteries, motors, and transformers show a steady growth. Supplies are principally obtained from the United Kingdom, but American competition, particularly in batteries, is very keen. Electrical material, such as cable and wire, is in demand; also electric light fittings. The sale of electric lamps is expanding, but British lines experience strong competition from Dutch makes. Electric refrigerators, cooking ranges, water heaters, and other household appliances have a growing sale.

Other Lines.—Demand for pumps and accessories, drills for water boring, etc., knitting and sewing machines, boilers and boiler tubes, machine and mechanics' tools, and typewriters is increasing, with good openings for British goods. Competition is chiefly from the United States. The iron and steel market is of growing value, and the keen competition necessitates close attention to needs. Flat and corrugated galvanized sheets have an excellent sale; supplies are obtained almost entirely from the United Kingdom.

CHAPTER III

Exporters must be careful to distinguish the Colony from the Union of South Africa. It is always advisable to obtain a separate report on openings in Rhodesia. The best method is for the manufacturer to send out his own personal representative; if this is not possible a report from a reputable source should certainly be obtained. It is not advisable to work the Colony from a headquarters in South Africa; a representative should be appointed in Salisbury or Bulawayo. Advertising campaigns can, however, be conducted from the Union, provided the advertising agent keeps in close touch with the representative in Rhodesia.

HARDWARE, CUTLERY, AND VEHICLES

The steady growth in the population has resulted in an increasing demand for hardware and cutlery. There is an expanding market for domestic hardware, one which deserves close attention from British manufacturers. Stoves and ranges and parts are chiefly obtained from the United Kingdom. Lamps and lampware are in request; competition from Germany and the United States is very keen. Enamel-ware and hollow-ware have a ready sale; imports are chiefly from the United Kingdom, but the German share of the trade has shown a considerable growth in recent years. General hardware lines are in request. There is a good demand for pick-axes and shovels from the United Kingdom; competition is from the United States and Germany. Nails, screws, and washers are also obtained very largely from the United Kingdom; wire nails, however, come mainly from Belgium, which has captured the trade as a result of the low price of its products.

Builders' Hardware.—Building is very active throughout the Colony, and this activity, both on public works and on private account, appears likely to continue. There is, in consequence, an excellent market for builders' hardware from Great Britain. The market is keenly competitive, and although the United Kingdom has a strong hold, Germany supplies considerable quantities of hinges and butts for doors and windows. The demand for steel ceilings is increasing, competition being mainly from South Africa. Structural steelwork has an expanding sale, the trade being largely in British hands.

Cutlery.—Cutlery, both plated and unplated, is in request. There is a demand for good-quality tableware. British lines have the largest share of the trade, but the keen competition from American and German products necessitates close attention to market requirements. In 1928 the total imports of cutlery (not plated) were valued at £23,521, of which goods to the value of £13,966 came from the United Kingdom.

Wire.—The developments in the cattle industry have resulted in a great expansion in the demand for fencing material. Provided British manufacturers can compete in price with Continental products this market presents excellent openings. Imports of fencing material (not wire) reached a value of £20,379 in 1928, this being double the value for 1926. The British share is, however, quite small, Belgian products predominating. Fencing wire is in growing request; the United Kingdom is the chief source of supply, competition being mainly from Germany and the United States. Baling and binding wire is obtained principally from Germany and Belgium, and wire netting from the United Kingdom and Germany. Sieving and screening gauze is required; competition from South Africa is of growing importance.

Railway Equipment.—The steady development of transport facilities provides an expanding market for British goods. Plant and material for railways are in strong demand. In 1928 imports of heavy rails were valued at £110,041. Sup-

plies were obtained almost entirely from the United Kingdom, as also were the sleepers, locomotives, and rolling-stock required. Close attention is being given by the Government to road construction. During the period 1925-29, some 1,000 miles of gravelled roads were made, and nearly 900 miles of road cleared, stumped, and drained. Bridges, mainly of the low-level type, are being built throughout the country, thus providing a growing demand for steelwork, cement, etc.

Motor Vehicles.—The increased road facilities have resulted in a rapid expansion in the sale of motor trucks and vans, motor-cars, and motor and pedal bicycles. Road motor services have been, or are being established throughout the Colony, linking up the outlying areas with railheads. The increased demand is clearly shown by the trade returns. In 1928 imports of motor trucks and vans were valued at £45,850, and of chassis at £54,600, compared with £14,588 and £11,873 respectively in 1926. The trade in complete trucks and vans is largely in South African and American hands, but British chassis have a good share of the trade. Careful attention to requirements would result in an improved demand for British products. In general, 1 and 2½ ton lorries are needed.

Imports of motor-cars show a large increase, both in number and value. In 1928 the trade was worth £313,023, compared with £209,980 in 1926. A very good market exists for British cars, and it is satisfactory to note that imports from the United Kingdom increased in value from £18,180 in 1926 to £53,454 in 1928. American and Canadian firms, however, possess the greater part of the trade. Cars for general work should be of 20 h.p. or over; in and near the towns there is a growing market for light cars. Tourer models are usually preferred to the saloon type. Low petrol consumption is an excellent selling point. There is a growing demand for motor and pedal cycles, British makes controlling the trade.

The steady development of the Colony merits careful atten-

tion from United Kingdom producers of both passenger and commercial vehicles. Demand should increase considerably in the near future, and a sound knowledge of the market—allied to an efficient selling organisation—would undoubtedly result in expanding sales.

STRIKE A BLOW FOR EMPIRE TRADE!

EXCELLENT opportunities exist for the development of trade with the Eastern African Dependencies (comprising Kenya, Northern Rhodesia, Nyasaland, Tanganyika, Uganda, and Zanzibar), and business houses would be well advised to consider the possibilities they offer. To create and stimulate trade with this country, some of the chief products of which Coffee, Tobacco, Tea, Cloves, Cotton, Maize, Sisal, etc., etc., should be the aim of every patriotic firm. In addition to obtaining the finest quality goods, a fillip to Empire Trade is also being given.

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II

EAST AFRICAN DEPENDENCIES

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CHAPTER I

The areas comprising the East African Dependencies—Kenya, Uganda, Tanganyika, Zanzibar, Nyasaland, and Northern Rhodesia—present a rapidly expanding market for manufactured goods. British products have a strong hold on the market, but foreign competition is keen.

The improved economic position of the area was clearly shown by the effects of the prolonged drought of 1927-28. *Five years before, such a drought would have brought widespread ruin; in* 1928, *although commercial firms were badly hit and considerable loss was suffered by the agricultural and ranching community, the effect was simply to check progress*

for a time. Capable local representation is of vital importance. The question of sole representation should be considered with great care. It must be remembered that the territories cover a wide area, and consequently cannot be worked efficiently from one centre such as Nairobi. Also, it is very inadvisable to make Johannesburg or any other South African town the distributing centre for East African territories.

TEXTILES AND WEARING APPAREL

THE most valuable market in this area is that for textiles and wearing apparel, particularly for cotton piece-goods. Competition is very keen. The possibilities are fully appreciated by Japanese and Indian exporters and also by the Governments of these countries. A Japanese Trade Mission visited British East Africa in 1927, and a subsidized shipping service from Japan gives valuable assistance to Japanese textile manufacturers. The Government of India sent a Trade Mission in 1928, and its report emphasizes the value of the market to Indian manufacturers.

Competition from these two countries is largely in the cheaper lines, such as unbleached cotton piece-goods; but Japan particularly is now a serious rival in the better quality lines, as also is Holland. British exporters should pay more attention to the trade with the estates. Many estates have small stores which do a considerable amount of business in textile lines with the natives employed. Orders are for small bales, but while foreign firms are only too pleased to supply these, British exporters are not quite so willing.

Cotton Piece-goods.—The trade in unbleached cotton piece-goods is largely in the hands of Japanese firms. India and the United States are the chief sources for the rest of the business, the British share being negligible. The low prices of competitive lines make it very difficult for British exporters to

make remunerative sales, but the trade is well worth consideration.

Demand for bleached, printed, dyed, and coloured cotton piece-goods shows a distinct improvement. British firms have a good share of the market, which should expand considerably in the future. Competition in white bleached goods is mainly from Holland, but Japanese lines are making headway. In printed goods imports from both Japan and India are increasing; Japan is offering good qualities at comparatively low prices, and her activities merit close attention. Indian and Japanese activity is also increasing in dyed and coloured goods, though Holland is the chief competitor in these lines. Dutch firms also have a strong hold on the market for cotton blankets. Belgian competition in cotton blankets is of importance. Cotton thread is mainly imported from India and Holland.

Woollens and Apparel.—Imports from Great Britain command the market for woollen and linen goods. There is a fair demand for woollen blankets, rugs, and tissues. Haberdashery and millinery have an expanding sale; they are largely supplied by British firms, but increasing rivalry is being experienced from Japan, Germany, and Italy. Japanese competition, particularly in cotton underclothing, necessitates careful attention, for the lines are of good quality and are selling at prices well below those of similar British goods. Other wearing apparel is largely imported from the United Kingdom; but Germany competes actively in hats and caps, and Indian firms have a fair proportion of the trade in boots and shoes. In Northern Rhodesia, imports from South Africa are obtaining a growing share of the business in outer garments. Second-hand wearing apparel has a fair sale among the natives.

Silk and Artificial Silk.—An important market is that for silk tissues, China and Japan being the chief sources of supply. An opening of great potential value exists for artificial silk. In Uganda particularly artificial silk is a serious rival of velvets, velveteens, and cotton brocades, and is likely to en-

croach on the market for silk goods. Artificial silk underwear and hosiery should have a growing sale. The possibilities of the artificial silk trade merit very careful attention from British manufacturers, and no time should be lost in investigating and entering the market.

CHAPTER II

A close study of local conditions, crop prospects, etc., is of vital importance when trading with British East Africa. Demand varies greatly in the different territories according to the degree of prosperity of the native consumer, whose purchasing power is governed by the return obtained from the crops. In appealing to the native, the value of a brand mark cannot be over-estimated. Careful attention must be given to packing, and brightly coloured wrappings and containers have a considerable selling value. Quotations should be c.i.f. An appeal to the European population should be supported by a Press advertising campaign.

General demand shows a steady expansion, the increasing purchasing power of the natives being reflected in the growing market for cheap luxury lines such as gramophones, bicycles, etc. Trade returns for 1928 *showed an increase in imports of the better quality goods, and given favourable crop seasons this improved demand should continue. It must always be remembered, however, that in East Africa low price is a more important factor in sales than good quality.*

METAL GOODS

The market for iron and steel goods, machinery, railway, and harbour equipment, motor vehicles, electrical equipment, cutlery, hardware and other metal goods is of growing importance. Demand is increasing not only from the European but also from the native population, for, owing to the great extension in the cultivation of cotton, coffee, etc., the purchasing power of the tribesmen has shown a considerable increase. In the iron and steel trade, British firms are making good headway, despite keen competition from German, American, and Belgian firms. The construction of steel and concrete build-

ings provides excellent openings for steel girders, beams, etc., and metal windows and machines for concrete mixing and blockmaking are also in request. The mining industry constitutes a good market for wire ropes and cables; wire mesh is in demand for mosquito gauze, coffee drying trays, mining screens, etc.

Machinery.—The market for machinery and equipment, particularly for mining and agriculture, is steadily improving. Developments in copper and zinc mining in Northern Rhodesia, tin mining in Tanganyika, etc., have resulted in an increased demand for engines, drills, pumps, and other mining machinery and equipment. The exploitation of the extensive mineral resources will result in a still further expansion in demand in the near future. The demand for agricultural machinery and implements is largely influenced by the shortage of native labour.

A steady increase is to be found in the demand by the sisal, maize, coffee, and other primary industries for agricultural equipment of all kinds. Weighing machines have a good market, and native cultivators are showing an increasing preference for ploughs and other agricultural implements. Strong competition is experienced in these lines from American and German products, and British firms must pay close attention to local requirements if they wish to increase their trade. The soil is generally dry and often stony, and machines must be designed accordingly.

Transport Requirements.—Means of communication and transport are being steadily developed, great progress having been made during the last few years. The facilities of the ports of Kilindini and Dar-es-Salaam are being extended, providing good openings for harbour and constructional machinery, cranes, and other port equipment. Developments at the port of Beira, in Portuguese East Africa, should not be ignored, for this port is the nearest seaport for Nyasaland and Northern Rhodesia, and much of their trade passes through it. Railway facilities are rapidly extending, and a growing

market exists for steel rails—particularly light rails—locomotives, coaches, and other railway equipment. During the next few years a considerable sum will be spent on the development of the railway systems of the area, and British firms should secure the whole of the trade.

Road Vehicles.—Roads are being constructed throughout the area, but at present the mileage of first-class roads is very limited. Existing roads are mainly dirt tracks, liable to disappear during the wet season, but giving a hard surface during the greater part of the year. The market for motor vehicles has shown an enormous increase during the last five years. Passenger cars must be suited to local conditions, and have a good clearance and possess sufficient engine power to pull them out of any trouble from wet ground or short, steep gradients. Sales of British cars are steadily increasing, and in 1927 some 22 per cent. of the imports were British, as compared with only 1 per cent. in 1922. Passenger cars, lorries, and tractors are in great demand, and British makes meet with strong competition from American and Canadian products; the majority of the tractors are supplied by Canadian firms. The motor vehicle market is likely to show an even greater expansion in the future. Provided British manufacturers give the market the attention it deserves, give efficient service as regards spares, etc., and run good publicity campaigns, there is no reason why they should not capture the trade. Local sentiment is very favourable to British products, but publicity is essential. Makers of tyres and other motor accessories will find an expanding market for their products. Pedal cycles have a good sale, particularly among the native population.

Electrical Equipment.—Up to the present there has not been any extensive development in the provision of electric power. In Northern Rhodesia a big hydro-electric scheme is in hand in the mining area, and provides openings for electrical equipment, both for the power scheme and for the mining industry. A few large centres are provided with electric power and present a growing market for electric light accessories,

electric household devices, etc. Dutch competition in cheap electric light bulbs is very keen. The demand for small electric power sets is increasing in the up-country districts, and an expanding market exists for electric refrigerators; care must be taken that the refrigerators are suited to local conditions. The market for wireless sets and accessories should grow rapidly in the near future, as the broadcasting station at Nairobi is now completed.

Hardware and Cutlery.—The market for cutlery, hardware, and instruments deserves closer attention from British exporters, although British products are maintaining their share of the trade. Careful study of local needs and increased publicity are essential, however, if the competition from American and Continental lines is to be overcome. High-quality table cutlery has a fair sale, and there is a good market for the cheaper lines. Bush knives for use on the sisal plantations, hunting knives, cheap pocket-knives, etc., are also in demand. The market for hardware is mainly in cheap lines, and is largely in German hands. A growing demand exists for builders' hardware; paint and cement are also in demand. Sporting goods of all kinds, such as rifles, vacuum flasks, and other *safari* equipment, have a ready sale.

Advertising.—Press advertising plays an important part in marketing campaigns in the East African territories. The progress that is being made is resulting in increased spending power among both Europeans and natives, and appeals through the Press are of growing importance. Advertising must be continuous, for spasmodic publicity is of little value in these tropical areas.

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WAS

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PALM KERNELS	PALM OIL
COTTON LINT	PALM KERNELS
COCOA	KOLA NUTS
TIN	MAHOGANY
GROUND NUTS	DIAMONDS
HIDES & SKINS	GOLD
MAHOGANY	MANGANESE
TOTAL TRADE £33,000,000	TOTAL TRADE £24,000,000

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III

BRITISH WEST AFRICA

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CHAPTER I

British West Africa, comprising Nigeria, the Gold Coast, Sierra Leone, and Gambia, is a market of the greatest potential value to British manufacturers interested in export trade. Its 25,000,000 *inhabitants show a rapidly growing demand for manufactured goods of all kinds, and their purchasing power is steadily expanding as the prosperity of the Colonies and Protectorates increases.*

Nigeria and the Gold Coast are the most important areas, taking imports valued at more than £28,000,000 *per annum. Sierra Leone and Gambia have a combined annual import trade valued at some* £3,000,000. *The great developments in the production of cocoa, palm oil, and kernels, ground nuts, minerals, etc., are clearly shown by the marked upward tendency in export trade, and the increased prosperity is reflected in purchases. The total external trade of the Gold Coast, valued at* £24,101,000 *in* 1928, *showed an increase of* 61 *per cent. in five years.*

It must be appreciated that in the majority of lines the market is mainly a price market, and cheapness is consequently a vital factor in sales. The value of a personal visit cannot be over-estimated. Purchases by Government depart-

ments are of very considerable importance, and British exporters should keep in close touch with the departments concerned. The actual buying is done in London by the Crown Agents for the Colonies.

TEXTILES AND WEARING APPAREL

THE necessity for studying the trend in demand in each territory can be appreciated from the values of imports of textiles and wearing apparel in 1927 and 1928. Imports into Gambia and Sierra Leone, for example, showed an increase in the majority of lines, cotton piece-goods imported into Gambia actually increasing by 23 per cent. Yet import figures for the Gold Coast, owing to lower prices obtained for the cocoa crop, were smaller in a number of lines, a direct result of the decreased purchasing power of the native producer.

The market for textiles and wearing apparel of all kinds is of very considerable value, and it is one that will show rapid expansion as the prosperity of the Colonies and Protectorates increases. The tendency is towards better quality goods. The cotton piece-goods trade, the most valuable of the textile trades, is very largely in British hands. An excellent and growing demand exists for grey, bleached, and printed piece-goods and for coloured cottons and cotton goods dyed in the piece. Competition is chiefly from Holland and Germany, and is particularly severe in printed piece-goods.

Cottons.—Sewing cotton, cotton yarn, and cotton hosiery are in strong request, imports being mainly from the United Kingdom. Competition is experienced from cotton hosiery of German and French origin, particularly in Nigeria. Velveteen is largely imported from the United Kingdom, but German lines have a fair share of the trade. A small market exists for linen manufactures. Woollen yarns and manufactures have a sale. The market presents openings for British products; at present, particularly in Nigeria, a large percentage of imports is obtained from Germany.

Silk and Artificial Silk.—Silk velvet is in demand, but German firms have a strong hold on the trade. Other silk manufactured products are obtained mainly from the United Kingdom, competition being chiefly from Germany and Holland. An expanding market, and one well worth the attention of British manufacturers, is that for artificial silk goods. Existing trade is controlled by British lines, and close attention to the market should result in a great increase.

Wearing Apparel.—Apparel and allied lines sell well, and present openings for British products. Imports of apparel are obtained principally from the United Kingdom; competition in the Gold Coast and Nigeria is chiefly from Germany, and in Sierra Leone and Gambia from France. An expanding market exists among the native population for men's ready-made and second-hand clothing. This trade, and also that in second-hand felt hats, caps, etc., merits close attention.

There is a fairly good market for haberdashery and millinery; in Nigeria this trade is largely in German hands, but British goods secure the greater part of the trade in the other areas. Umbrellas and parasols have an excellent sale: French and Dutch products have a large share of the trade, but openings are presented for an increase in the British percentage. Boots and shoes made of leather are chiefly imported from the United Kingdom, but in regard to other boots and shoes keen competition is experienced from Germany and France. German competition is strongest in the Gold Coast and French competition in Gambia and Sierra Leone. French firms have a good share of the trade in slippers.

Hats, caps, and other headgear are in request, but British exporters will find keen competition from German and French products. Sports equipment of all kinds sells readily, particularly among the European inhabitants. There is a good market for boots and shoes for sports wear; owing to competition, price is an important factor. Coloured cotton football jerseys are very popular among the native population.

CHAPTER II

Manufacturers looking for fresh openings oversea for their products should not ignore British West Africa, for in that market there are excellent prospects for new lines. Reliable information concerning the market can be obtained from the Department of Overseas Trade and the Crown Agents for the Colonies, while the Gold Coast Commercial Intelligence Bureau has been opened to supply information relating to the Gold Coast in particular and the West Coast in general.

Careful attention must be given to all factors influencing demand, and also to methods of marketing. Wrappings and packing must be studied; brightly coloured containers make a strong appeal to the native consumer. Demand is greatly influenced by the degree of prosperity in the leading primary industries. Exporters must therefore see that they are well informed regarding developments in production and export trade, and the effect of such developments on demand in the different areas.

METAL GOODS

One of the most valuable markets is that for metal goods of all kinds, including machinery, railway and tramway equipment, implements and tools, general hardware, cutlery, and motor vehicles. British products have a strong hold. Competition is mainly from Germany, whose goods are relatively cheap. In Gambia and Sierra Leone, French competition is of importance, while there is growing competition from the United States of America in certain lines.

Transport Developments.—Recent progress is mainly the result of the opening-up of various areas. Great attention has been given to railway, road, and harbour construction, and considerable developments will take place in the near future.

In consequence, an excellent market exists for railway equipment, and for constructional material for roads, bridges, and harbours. At the end of 1928 there were in British West Africa more than 10,000 miles of roads suitable for motor traffic.

Motor Vehicles.—These roads can be used by light cars as well as by heavy motor vehicles, and the steady increase in mileage has led to a remarkably increased demand for motor-cars and lorries, particularly among the native population. Imports of motor-cars and lorries are increasing in number, the value of total imports into West Africa exceeding £1,150,000 annually. Good openings exist for an increase in the British share of this trade, particularly in the Gold Coast, where imports are mainly from the United States. In the other areas, the British share is considerably larger. Demand should show a great expansion in the next few years. Motor transport services have been established. Motor cycles and pedal bicycles have a good sale, the trade coming almost entirely to the United Kingdom.

Machinery.—The market for machinery is of growing value, progress in railway and road construction enabling heavy machinery to be taken to mines in districts away from the coast ports. Machinery is being installed on a large scale in the tin, coal, manganese, gold, and other mines, and developments will lead to a considerable increase in demand. Industrial, water boring and pumping, marine, and railway and tramway machinery is in request. Agricultural machinery has only a small sale. American products have a good share of the trade in mining machinery, particularly in Nigeria, and American and German competition is keen in agricultural machinery. Other machinery is chiefly obtained from the United Kingdom. Petrol engines have a good sale.

Electrical Equipment.—The market for electrical machinery and equipment is of growing value. Electricity supply schemes have been developed in some of the chief towns, such as Sekondi, Kumasi, Accra, Lagos, and electric cranes have

been installed in Takoradi harbour. Further schemes are in hand, and experiments are being made in the development of hydro-electric power.

Sewing machines are in strong request among the natives; competition is chiefly from Germany. Typewriters have a good sale, the import trade being largely in British hands. Agricultural, artisans', and other implements and tools are in demand. Electrical and telegraphic apparatus and scientific instruments are obtained almost entirely from the United Kingdom, purchases being mainly on Government account.

Hardware and Cutlery.—The growing prosperity of the native is reflected in the desire for better houses and household equipment. Imports of corrugated iron sheets show a steady increase, and buckets, pails, and basins are in good request. Cast iron and enamelled ware, general builders' hardware, made-up doors and windows, steel windows, and cement have a growing sale. Lamps and lanterns have an excellent market, one which is, however, largely controlled by cheap German and American lines. Table cutlery, pocket-knives, machetes, razors, etc., are in growing demand, German products having the greater part of the trade.

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IV

CEYLON

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[Par of Exchange: One Rupee (Rs.1) = 100 cents = 1s. 6d.]

CHAPTER I

The growing prosperity of Ceylon is indicated by the steady expansion in the oversea trade of the Colony during the post-war period. Production has greatly increased, business conditions are healthy, and the balance of trade is favourable.

Careful attention to requirements will result in a considerable increase in the demand for British goods. One vital factor, however, is often ignored. Ceylon is a separate

market and must be treated as such. It should not be treated as a part of India, or handled from Bombay, Calcutta, or Madras. Manufacturers should appoint representatives in Ceylon and advertise in Ceylon newspapers. The population is small, totalling approximately 5,000,000, *including some* 9,000 *Europeans; the standard of demand and* per capita *purchasing power of the Ceylonese are, however, considerably higher than those of the Indian.*

TEXTILES AND WEARING APPAREL

The most valuable section of the import trade of the Colony is textiles and apparel. British manufacturers have a firm hold on this trade, but competition from Indian and foreign countries is very keen. The demand for cotton yarn and twist is small, and is largely satisfied from India. The United Kingdom has a fair share of the trade in grey yarn and twist.

Cotton Piece-goods.—The market for cotton piece-goods is very important. Bleached and grey piece-goods are obtained almost entirely from the United Kingdom, total imports in 1928 being valued at Rs.5,766,578 and Rs.998,280 respectively. Imports of dyed piece-goods were valued at Rs.9,736,934 in 1928. Imports of printed piece-goods declined from a value of Rs.6,374,092 in 1927 to Rs.4,130,880 in 1928. It is significant that this fall was almost entirely in goods from the United Kingdom. Muslin and other cotton piece-goods came mainly from the United Kingdom.

Owing to the increased prosperity of the inhabitants, the demand for piece-goods is steadily growing. British exporters should note this trend, and establish good quality lines. Competition is mainly in the cheaper lines, and encouragement of the taste for quality would favourably affect British trade. Close attention must be given to finish and colour.

Cotton lace and net imports increased in value from Rs.176,829 in 1927 to Rs.224,222 in 1928. The United

Kingdom obtained practically all the increased trade. Cotton thread is sent almost entirely from the United Kingdom.

Woollens and Silks.—Woollen goods and goods of mixed materials have a growing market. Dark blankets are wanted, but imports are mainly from India. Carpets and rugs come from the United Kingdom and India.

Cloths and stuffs of pure wool are obtained from the United Kingdom. Demand is not large, but showed a relatively good increase in 1928. Cloths and stuffs of mixed materials have an expanding sale, and the trade is mainly with the United Kingdom.

Handkerchiefs are imported chiefly from the United Kingdom, but Japanese competition is increasing. Piece-goods of mixed materials are in strong demand. An excellent opening exists for silk and artificial silk goods. Special points in requirements, such as the demand by Singhalese women for certain definite lengths of material, should be studied. The trade in artificial silk goods is rapidly growing and deserves the closest attention from British producers.

Apparel.—In apparel, including outer and under garments, shirts, coats, vests, trousers, dresses, etc., keen competition is experienced from Japan, India, and China. Second-hand jackets have a good sale among the Tamil labourers in the country districts. Cotton banians—cheap cotton vests commonly worn by the Ceylonese—were imported in 1928 to a value of Rs.1,076,748. This trade is largely in Japanese hands.

Haberdashery and millinery have an expanding market, the United Kingdom supplying some two-thirds of the demand. Competition is chiefly from India, and Japan, Germany and France have small shares of the trade. Hosiery imports in 1928 were valued at Rs.342,875. The United Kingdom has a good hold on the market, but very keen competition is experienced from the United States, China, Japan, and Germany.

Boots and Shoes.—In regard to boots and shoes there is a growing demand for better quality products; local production is confined to cheap lines. Hats and other apparel are in increasing request, and the trade is largely in British hands.

CHAPTER II

The increasing demand for better quality goods of all kinds emphasizes the expanding purchasing power of the inhabitants of Ceylon. Imports are obtained chiefly from the United Kingdom and British India, but foreign goods are increasing and now exceed 25 per cent. of the total import trade. The British share has declined in recent years, and the closest attention to market requirements is essential in order to increase it. Products from the United Kingdom do not receive preferential tariff treatment, but the mercantile houses give preference to British goods where possible.

METAL GOODS, HARDWARE, AND CUTLERY

The market for metals and metal manufactured goods is, with but few exceptions, very largely supplied by imports from the United Kingdom. The total value of the demand assumes considerable proportions, and developments in industry, transport, and the provision of electric power should result in a further expansion in the future. Local secondary production is small, but the number of factories totalled 1,642 at the end of 1927, a net gain of 23 during the year. Engineering is of importance and results in openings for equipment and plant.

Pig iron is obtained from the United Kingdom and British India. The United Kingdom is the principal supplier of iron and steel bars, rods and angles, and steel girders, beams, joists, and pillars. Strong competition is experienced from Belgium, while Germany, France, and Luxemburg have a share of the trade. Belgium is the chief source of hoop iron, and in 1928 Germany ousted the United Kingdom from the second place in this trade.

Plates and Sheets.—Iron and steel plates and sheets, not tinned or galvanized, were imported to a value of Rs.781,782

in 1928, compared with Rs.679,699 in the preceding year. Belgium obtained a larger share of the trade at the expense of the United Kingdom. Flat and corrugated galvanized plates and sheets, however, are almost entirely obtained from the United Kingdom. Germany is the chief competitor for orders for tubes, pipes, and fittings; the value of her imports fell in 1928, while British imports showed a slight increase.

Wire Products.—The market for wire products needs careful attention. A good demand exists for barbed fencing wire, but the trade is largely in German hands. A satisfactory feature of this trade in 1928 was that, while total imports declined, the decrease was entirely in goods from Germany, United Kingdom products actually increasing by Rs.20,000 in value. Other wire and fencing wire and also wire manufactures are obtained chiefly from this country. The trade in wire netting is divided between British and German firms.

Nails and tacks, rivets, washers, bolts, and nuts are obtained chiefly from this country, competition being from Norway and Germany. Imports of black painted or galvanized tanks and drums of iron and steel increased last year; the increased trade was obtained by British India, imports from the United Kingdom declining slightly. Other manufactures of iron and steel, valued at nearly Rs.4,750,000 in 1928, were supplied almost entirely by British firms.

Prime Movers, etc.—Hydraulic and internal combustion prime movers have an expanding sale. Imports of internal combustion prime movers increased in value from Rs.874,481 in 1927 to Rs.1,061,298 in 1928; and of hydraulic prime movers from Rs.157,340 to Rs.168,555. United Kingdom products supply nearly all the demand. Boilers and boiler-house plant, cranes, hoists, and lifting machinery have a ready sale, imports being mainly of British origin. Manufactures of brass and alloys of copper are wanted, British products being chiefly in demand, though keen competition is experienced from German firms.

Hardware and Cutlery.—There is a steady inquiry for hollow-ware, hardware, and cutlery. In 1928 imports of enamelled or tinned household and kitchen utensils were valued at Rs.317,716 compared with Rs.314,582 in 1927. The British share of the trade showed a decline, while imports from Czechoslovakia and Japan increased, Japan becoming the chief source of supply. The demand for aluminium ware fell heavily in 1928; imports from the United Kingdom decreased by Rs.18,000 in value, while imports from the two chief competitors, Germany and Switzerland, showed only a small decline. These markets need careful attention in face of strong Continental and Japanese competition.

Imports of hardware and cutlery, knives, scissors, razors, and other cutlers' ware were valued at Rs.419,210, representing a small increase compared with 1927. Very strong competition is experienced from Germany, but it is satisfactory to note that, while German imports fell last year, British trade increased. Silver plate, silver gilt plate, and electro plate, for which a fair market exists, are obtained almost entirely from the United Kingdom.

Dental, surgical, optical, medical, and other scientific instruments and appliances have a fair sale, British lines controlling the trade. In the market for clocks and watches there is very strong competition.

CHAPTER III

British manufacturers of electric machinery and equipment, railway locomotives, carriages, waggons, and trucks benefit considerably from demand from Government departments in Ceylon. Purchases are made through the Crown Agents for the Colonies in London, and British products are ordered where possible.

MACHINERY, ELECTRICAL EQUIPMENT, AND VEHICLES

AGRICULTURAL machinery is not widely used, but it is significant that imports in 1928 were valued at Rs.29,403, compared with Rs.5,818 in 1927. Agricultural implements and tools, including tools for use on the estates, tapping knives, and pruning knives are in strong demand. These are obtained almost entirely from the United Kingdom. Machine tools and other implements and tools and parts have a ready sale, imports being valued at Rs.639,138 in 1928; British manufacturers supply the greater part of them, competition being mainly from the United States and Germany.

Industrial Machinery.—There is an expanding inquiry for machinery for local industries. The United Kingdom supplies the greater part of the foundry and workshop machinery required, but in 1928 imports from the United States showed a large increase compared with the preceding year, while British imports decreased. America obtained the major share of the improvement in the demand for textile machinery.

Imports of tea-making machinery, valued at Rs.1,508,595 in 1928, expanded by Rs.204,000 as compared with 1927; the British share was worth Rs.1,391,818. Tea lead is in good demand, but while imports increased in 1928 the British share fell heavily, British India obtaining the trade. Rubber re-

fining, printing and bookbinding, pumping and sugar-making machinery are obtained almost entirely from the United Kingdom. There is also a market for oil-crushing machinery for use on the coconut estates, and for weighing machines. Sewing machines have a ready sale, the market being in British hands. Typewriters are imported chiefly from the United States, but the United Kingdom has a fair share of the trade.

Electrical Equipment.—Developments in the supply of electric power have resulted in increasing requests for electrical equipment and machinery. A Government station has been erected at Watawala for the provision of hydro-electric power, and the scheme is now progressing favourably. The chief towns have electric tramway services, and the use of electric light and power is rapidly growing. Electric control and switch-gear, generators, alternators, and dynamos, motors, transformers, and converters, and other electrical machinery have a good sale. Imports are almost entirely from Great Britain.

Electric wires and cables, and telephone and telegraph instruments and appliances are in strong demand, British lines controlling the trade. Imports of electric light accessories and fittings, including switches, were valued Rs.603,252 in 1928, as compared with Rs.442,068 in the preceding year. The trade is largely in British products, but competition from the United States, Germany, and Holland is very keen and merits close attention. Other electrical goods, imports of which were valued at Rs.627,599 in 1928, are obtained mainly from the United Kingdom. There is a growing demand for household electric appliances. Small electric power sets have a sale on the estates.

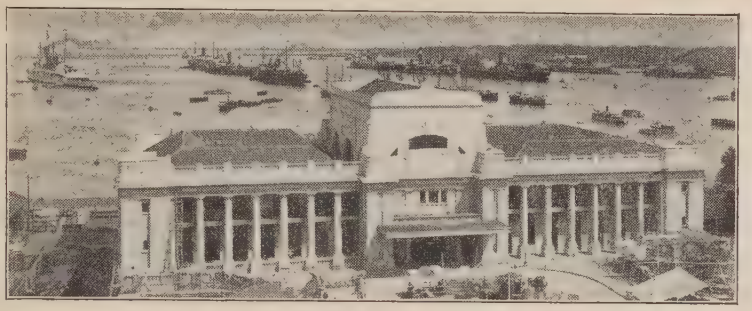
Vehicles.—Careful attention has been given by the Government to the development of means of communication, harbours, docks, and irrigation works. An excellent railway system is in operation, and the market for railway rolling stock is of the greatest value.

At the end of 1927 there were 4,487 miles of road open to

traffic. These roads are suitable for motors, and recent years have seen a great increase in the demand for motor vehicles of all kinds. On December 31, 1927, there were 17,340 motor vehicles registered and in use, comprising 9,071 private cars, 1,339 cars plying for hire, 2,135 motor omnibuses, 1,872 lorries and vans for carrying goods and passengers, and 2,923 motor cycles. American makes predominated except in regard to motor cycles. Exporters of cars must satisfy the requirements of the market. Strongly built cars with a good clearance and a minimum of 20 h.p. are needed.

Road motor services have been developed, and now are serious competitors of the railways. Imports of motor lorries for conveying goods were valued at Rs.2,243,692 in 1928, compared with Rs.1,916,770 in 1927. Imports from the United States and Canada increased, while those from the United Kingdom declined.

Tractors.—Agricultural tractors imported are obtained from Canada, British producers having entirely lost their share of the trade. Other mechanically propelled tractors were obtained largely from the United Kingdom. The pedal-cycle trade is entirely in British hands.



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V

BRITISH MALAYA

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[Par of Exchange: 1 Straits dollar ($) = 100 cents = 2s 4d.]

CHAPTER I

Despite the rapid progress of British Malaya since the war, its commercial possibilities are not yet fully appreciated by the British manufacturer, with the result that foreign competitors have been allowed to obtain a firm footing in many lines. Local representation is of primary importance, for the variety of races in the area necessitates a thorough knowledge of the market and its peculiarities. Manufacturers should keep in close touch with developments in the tin, rubber, coconut products, and oil palm industries, for the purchasing power of the inhabitants is largely governed by the degree of prosperity of these industries.

TEXTILES AND WEARING APPAREL

THE market for textiles and wearing apparel is very important for British manufacturers. There is no local production, but very keen competition is met with in all branches of the trade from India, Japan, China, the Dutch East Indies, and Continental countries. The textile market is particularly affected by the degree of prosperity of the rubber and tin industries, and during 1927 the fall in world prices of both rubber and tin had an adverse effect on demand.

The textile trade is largely in the hands of a few big Chinese importing houses, which have a high standard of commercial morality.

Cotton Goods.—Cotton-piece goods are in strong demand. In 1928 the United Kingdom's share in plain lines was valued at $7,114,000 out of a total of $10,203,000; in printed lines, $3,770,000 out of $5,487,000; and in goods dyed in the piece, $5,878,000 out of $13,782,595. Imports from Japan and India, particularly of piece-goods dyed in the piece, showed, however, that these countries had obtained a considerably larger percentage of the trade than in the preceding year. British firms must pay very careful attention to the market if they are to retain their hold on the trade.

Imports of sarongs, slendangs, and kains—garments for the Oriental population—mainly come from India and the Dutch East Indies. The United Kingdom's share in 1928 was valued at only $580,000 out of a total of $12,847,000, but it is capable of considerable expansion.

Cotton handkerchiefs and crochets and knitting are largely imported from the United Kingdom. The demand for cotton blankets and rugs is of importance; the British share of the trade is not improving. Grey mercerized and grey bleached and dyed cotton yarns are mainly obtained from the United Kingdom, but India has captured the market for grey unbleached yarn.

British lines control the market for cotton thread, but keen

competition is experienced from Japan and other Eastern countries in household cotton goods. In the latter line good openings exist for an expansion in the British share of the trade, and it is satisfactory to note that in 1928 imports from the United Kingdom were valued at $144,772, against $132,675 in 1926, although the total imports in 1928, $746,153, showed a decrease. Cotton patent net goods are mainly obtained from the United Kingdom, but Japan has a strong hold on the trade in cotton wick and waste, while India supplies a large percentage of other coloured cottons.

Woollens.—The import trade in woollen goods fell heavily in 1927 compared with 1926. The British share of the trade was maintained, with imports valued at $1,563,865 out of a total of $2,595,852. In 1928 total imports again fell, but United Kingdom lines maintained their hold. Demand is mainly for cloth, blankets, carpets, and rugs.

Silk Goods.—An excellent market exists for silk products. Imports in 1927 were valued at $7,184,143, and in 1926 at $9,847,520, the decrease being mainly in piece-goods and thread. Although total imports of piece-goods fell heavily, those from the United Kingdom showed an increase from a value of $614,208 to $658,707. In silk thread, however, British imports were much smaller; silk sarongs, slendangs, and kains are largely obtained from Japan. The openings for silk handkerchiefs and ribbons are well worth careful study by British manufacturers. Imports of silk and silk manufacture in 1928 showed a considerable decline, British trade suffering very much. Imports from the United Kingdom were worth only $185,674.

Artificial silk piece-goods are in demand, imports in 1928 being valued at $2,351,000. Japan and Continental countries provide very keen competition in this market. The British share of the trade is capable of considerable expansion.

Jute and Linen Goods in Request.—Manufactures of other textile materials, such as jute and linen, are wanted. British manufacturers have some 50 per cent. of the trade in

canvas; competition is mainly from Japan and the United States. A fair demand exists for damask table linen, almost the whole of which is satisfied by imports from the United Kingdom.

Apparel.—The market for wearing apparel of all kinds provides excellent openings for British products. The market for haberdashery and millinery was worth nearly $2,000,000 in 1927, the British share of the trade being valued at $836,997; competition is chiefly from Continental countries. Total trade declined in 1928. Outer garments are in request, but clothes for both men and women are generally made up locally. Cheap European-type clothes are in demand among the Chinese population. Underwear for both men and women finds a good sale. It must be light in weight; white shirts are generally worn by men. Silk underwear is needed, and there is a profitable market for good branded lines of artificial silk underwear. The British share of the trade in underwear should improve in the future; at present imports from the Continent, India, and Japan greatly exceed those from the United Kingdom.

The market for imported hosiery, valued at $793,000 in 1928, presents good openings for British manufacturers, whose share of the trade in that year was worth only $156,000. Manufacturers of artificial silk hose should find the market worthy of attention. Cheap cotton hose has a good sale among the Oriental population. Flannels, etc., for sports wear are in request.

Hats, caps, and other headwear find a ready sale, imports in 1928 being valued at more than $1,000,000. The trade is largely in the hands of Continental and Japanese firms, the British share being worth $395,185. The solar topee is worn by both men and women, demand being largely for the lightweight type. "Single-terai" and "double-terai" felt hats are commonly worn by planters. An excellent market for cheap felt hats and cloth caps is found among the Chinese community.

The market for leather boots and shoes is largely in British hands; leather shoes for evening wear have a good sale. Openings for other boots and shoes, mainly of canvas, are expanding; this trade is largely in the hands of Japanese and American firms, and presents good opportunities for British lines.

CHAPTER II

When exporting goods to British Malaya, careful attention should be given to packing and labels. Where the goods are destined for consumption by the Oriental community, labels and directions on the packing must be in the language of the consumer—i.e., in Chinese, Malay, Tamil, etc. Advertising is a necessary part of marketing. The trade of the country is chiefly in Chinese hands, and consequently appeals to the Chinese commercial community are of the greatest value.

METAL GOODS

The market for metal goods, which, for the purpose of this article, includes iron and steel goods, machinery, electrical equipment, cutlery and hardware, and vehicles of all kinds, is of great importance to the British exporter. It is steadily expanding. In the majority of lines keen competition from American and Continental firms must be faced. This competition is largely in price, but in certain lines the foreign article finds a ready market because of its suitability to the needs of the market. For the tin-mining industry dredging machines, materials, and spare parts are largely supplied by British firms, but strong competition is experienced from Dutch and American firms. The rubber industry provides a good market for macerating machinery and steel rollers. The demand for crushing and extracting machinery for the oil palm industry is steadily increasing.

Electrical Goods.—The demand for electrical generators, motors, and magnetos has grown very rapidly during recent years, and an expanding market exists for insulated wire and cables, batteries and accumulators, electric lamps and parts, electric lighting accessories and fittings, small electric power sets, and other electrical goods and apparatus.

Equipment.—Road constructional machinery, cranes, hoists, and other harbour equipment, prime movers, boilers and boiler-house plant, and printing and book-binding machines are also in demand. The construction of the Singapore naval base and the works connected with the Perak hydro-electric scheme have resulted in a considerable increase in the demand for constructional equipment. The market for sewing-machines is of growing importance. Good openings also exist for British typewriters and other office equipment; at present the market for these lines is mainly in American hands.

A demand exists for plant for mineral water factories, several of which have been established. The pineapple canning industry is steadily developing, and in the future will probably provide a market for factory plant and equipment. Local secondary industry, however, apart from those industries connected with primary products, is not of importance.

There is a demand for corrugated and sheet galvanized iron, tin plates and tin-ware, yellow metal and zinc sheeting, hoop iron, and iron bars, shapes and sections. Wire fencing, nails, staples, and cables are required, the market for cables being of considerable importance; competition in these lines is mainly from Belgian and German firms.

Cutlery and Hardware.—The market for cutlery, hardware, and hollow-ware is capable of considerable expansion. Table cutlery is in demand by the European and the better-class Oriental population, and a good market exists for cheap pocket-knives. Various types of knives are required for the rubber, palm, and other primary industries, as well as for general use by the Oriental population; the shapes preferred must be carefully studied. Small agricultural implements are also in demand. Very good openings exist for small tools, such as carpenters', joiners', engineers', and general household tools; the Oriental population prefers the British article, and closer attention to local requirements would result in a

considerable expansion in trade. Iron and hollow-ware cooking and household utensils, bedsteads, and other general hardware have a growing market.

Copperware and brassware have a fair sale. The construction of buildings and houses at the Singapore Base has favourably influenced the demand for builder's hardware. The market for wireless sets and parts is growing, and is likely to improve as broadcasting is better developed.

Transport.—An outstanding feature of Malaya is the excellence of the means of communication, both by rail and road. The railway system is well developed. Locomotives of the "Pacific" type are used: these are generally obtained from the United Kingdom, and assembled in the well-equipped State railway workshops at Kuala Lumpur, where coaches and other railway equipment are constructed. Tubes, pipes, and fittings for railways and tramways are in demand.

Good roads exist throughout the area, the main highways in the Straits Settlements and the Federated Malay States being fully equal to first-class metalled roads in Great Britain. The market for motor vehicles is consequently of considerable importance.

Motor-cars.—The demand for passenger cars is steadily growing, and provides excellent openings for British products. At present, owing partly to lower prices and better service as regards spares, the market is largely in American hands. Imports from the United Kingdom are, however, steadily increasing. The British low-powered car of 12-14 h.p. is quite suitable for the greater part of the area. A good clearance and more body space than is common in the United Kingdom are required; careful attention should be given to the enamel, which must be able to resist the excessive heat.

Commercial Vehicles.—The market for commercial vehicles has shown a rapid growth during the last few years; demand has mainly been for the public services, but the use of lorries is extending in the mining industry and on the estates.

Motor cycles have a ready sale, both for private and for business use. A fairly cheap line is required by the general public; for use on the estates, where road surfaces are poor, a heavy, strong type, with a good clearance, is necessary. The market for tractors is expanding, and presents openings for British products. Pedal cycles are in great demand by the Oriental population.

VI

BRITISH WEST INDIES

CHAPTER I

With a total population exceeding 2,000,000, the British West Indies, the Bahamas, Bermuda, British Guiana, and British Honduras present a market well worth attention from manufacturers in Great Britain. Except in Bermuda and the Bahamas, goods of United Kingdom origin or manufacture receive preferential tariff treatment—a factor of considerable value. The United States is the principal competitor, her proximity to the market being of great assistance to her manufacturers. Canadian competition is of growing importance; there is a trade agreement between Canada and the British West Indies.

Owing to the scattered nature of the Colonies, it is not easy to obtain efficient distribution. Good representation is of primary importance. A method which has been found very satisfactory is for a number of firms dealing in non-competing lines to send out one representative to deal with all their products. Alternatively, the services of a travelling representative may be employed, or it may be advisable to appoint separate representatives in each of the larger areas. It is not difficult to find capable men.

TEXTILES AND WEARING APPAREL

Textiles, apparel, and allied lines command a good sale. During the war American products obtained a strong footing,

which they have retained to a great extent; but British exporters have since regained a leading position in the market.

The degree of success attained by British firms depends very largely on the attention given to the requirements of the market. Demand is mainly for the cheaper lines of cotton goods, although better quality cottons and silk, artificial silk, and woollen goods have a fair sale. British products have a firm hold on the cotton goods market, and there are openings for an expansion of trade in many sections. Cotton piece-goods are in strong demand. Owing to the custom of having material made up locally, there is an excellent demand for piece-lengths of voiles, crêpes de Chine, georgettes, marocains, ginghams, zephyrs, muslins, piqués, nainsooks, cambrics, etc. Cotton blankets have a good market; competition is mainly from Holland and Belgium.

Cotton Goods.—A strong demand exists for cotton wearing apparel. The market for men's underwear is for short-sleeve or sleeveless vests and short-length pants. Cheap singlets have a good sale among the labouring classes, price being the major consideration. Women's cotton underwear is in request, but it is essential that careful attention be given to fashionable style. Men's shirts and collars must be offered in a variety of patterns, striped patterns being the most popular. The English style of shirt is in demand, and there is also a good market for the American style of "tunic" shirt. Soft collars are preferred. Cheap shirts of strong material in blue, grey, and brown, with collars attached, have a ready sale among the working classes.

Hosiery.—An excellent opening exists for hosiery. The demand is largely for cotton lines, but lisle, silk, and artificial silk lines are also wanted. Cotton-mixture socks of attractive design for men's wear sell freely. The sale of artificial silk stockings is increasing. White, grey, black, and brown colours in hosiery are preferred. The trade in hosiery is mainly in American hands.

Market Openings.—Good openings are presented for increased trade in British products. Hats, bonnets, haberdashery and millinery have ready sales, the trade being largely in British hands. Sott felt hats are generally worn. Cheap cloth caps have a sale among the labouring classes, and there are requests for cheap felt hats. Keen competition is experienced from Switzerland in embroideries, and from Germany in ribbons and lace.

Opportunities exist for an increase of British trade in household linen, such as cotton and linen table-cloths, pillow-cases, and sheeting. Attractively embroidered, small, oval-shaped table-cloths are very popular, and there is a keen demand for tea and table-cloths and d'oyleys. Mosquito netting has a large sale. The demand for woollen goods is comparatively small, and is satisfied by British lines. Silk and silk manufactures are obtained from the United Kingdom, Canada, and Japan. Women's ready-made clothing, provided it is in fashionable style, has a sale, dresses, skirts, blouses, and jumpers being wanted. Ready-made frocks of silk or artificial silk are very popular.

Men's Wear.—Men's ready-made clothing is not in general demand, for "cheap" tailors are to be found in every area. There is, however, a market for high-class ordinary and sports wear in Bermuda among the numerous tourists who visit the island. Well-known makes of serge, tweed, and heather-mixture lounge suits have a sale, though somewhat limited, many people preferring white and khaki drill, shantung, and other tropical wear. Flannel trousers, shirts with collars attached, and other sports wear have a ready sale throughout the whole of the Colonies. British sweaters, woollen hosiery, caps, and other sports clothing are in demand. Sports equipment has a strong sale; American competition is mainly confined to tennis rackets.

Boots and Shoes.—The British share of the trade in boots and shoes is capable of expansion, particularly in Jamaica and

Bermuda, where American products have the main share of the trade. Canadian exporters satisfy practically all the call for white canvas shoes with rubber soles and heels. In Trinidad the trade is largely in British hands, although Canada has a good share.

IRAQ

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VII

IRAQ

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[Monetary Unit: The Indian Rupee.]

CHAPTER I

The careful attention given by the Administration to irrigation and transport facilities, and the exploitation of oil resources, have had a marked effect upon the development of Iraq. Trade has been stimulated, the demand for imported manufactured goods has expanded, and the commercial possibilities of the country greatly improved.

The import trade is largely in the hands of the United Kingdom and British India, the former supplying approximately one-third and the latter one-quarter of total imports. Demand for imported goods is not only from Iraq itself, but also from Persia—a valuable transit and entrepôt trade having been developed. Careful attention must be given to marketing methods. Representatives and distributors should be chosen with great care, for the standard of commercial morality is not high in certain sections of the business community. The appointment of a personal representative is advisable.

TEXTILES AND WEARING APPAREL

The most valuable section of the import trade is that in textiles and apparel. Of this trade the demand for cotton piece-goods is of leading importance. Competition in these lines is chiefly from India, which supplies the greater part of the imports of cotton twist and yarn, unbleached grey piece-goods and piece-goods dyed in the yarn. Bleached white piece-goods, goods dyed in the piece, and prints come very largely from the United Kingdom. Foreign products have only a small share of this trade, but their competition merits attention, particularly in view of the probable expansion in demand in the future.

Woollen piece-goods are in fair demand, imports being obtained almost entirely from the United Kingdom. Silk piece-goods have a ready sale. Haberdashery is in request, British products meeting with strong competition.

Apparel.—Wearing apparel is largely obtained from the United Kingdom. Indian competition is keen in clothing, and India also satisfies the demand for fezzes. Second-hand clothing has a sale. Boots and shoes come chiefly from the United Kingdom, but competition is very keen, particularly in boots and shoes made of other materials than leather. It must be appreciated that the market for textiles and apparel is a price market. Demand is mainly for lower quality lines, and cheapness is a vital factor in sales.

CHAPTER II

The method of packing is an important factor in sales. Bright colours have a strong appeal, and all selling matter must be in Arabic as well as in English, or in Arabic only. Credit of 60-90 days is generally required: certain lines should be sent on consignment. Adequate stocks must be kept in the chief centres, particularly in Bagdad. Publicity is of importance, and both the English and vernacular Press should be used. In appeals to the purely native population, it must be remembered that a large percentage is illiterate, and that bright display is of value.

METAL GOODS

METALS, metal manufactures and machinery constitute a market which will expand very considerably in the future. There is a growing demand for agricultural machinery, partly due to the increase in large scale farming. The shortage of labour and the lack of small farmers have handicapped the development in agriculture, and large scale farming is the only solution. Irrigation schemes have resulted in an increased acreage available for agriculture, and the demand for agricultural machinery of all kinds and tractors is steadily growing. Imports are chiefly obtained from the United Kingdom.

Industrial Machinery.—The market for industrial and other machinery is rapidly expanding, largely owing to developments in the oil industry. Imports in the first quarter of 1929 were greatly in excess of imports in the first quarter of 1928, the United Kingdom being the main source of supply. Railway plant and rolling stock, and constructional machinery and equipment are also of British origin.

Cement, Hardware, and Cutlery.—There is considerable activity in building, particularly by the Public Works Depart-

ment, and in the chief towns such as Bagdad and Basra. Cement for buildings, bridges, etc., is in demand. Builders' hardware has a good market, one in which foreign firms are showing a keen interest. Foreign competition is also strong in general and enamelled hardware, and cutlery. Implements and tools are obtained mainly from British firms.

Transport Facilities.—Close attention has been given during the post-war period to the development of transport facilities, and outlying areas are rapidly being opened up. Over 800 miles of railway are in operation, and the system is now linked up with Syria and the Persian frontier. Roads and bridges are being constructed, and the chief towns will in the near future be linked up by good motor roads.

Motor Vehicles.—The improvement in road transport facilities has resulted in an expanding demand for motor vehicles of all kinds. Imports of motor-cars for private use are rapidly increasing, and the growing trade presents excellent openings for British products. American competition is very keen. Motor transport is also being increasingly used for both passengers and goods, and public transport services are being inaugurated throughout the country. Motor cycles and pedal bicycles are in request.

COLONIES AND PROTECTORATES

(Including Mandated Areas)

MARKET DATA

Area and Population.—The total area of the Colonies, Protectorates, and Mandated Areas of the British Empire approaches 4,000,000 square miles. The total population of these areas according to census returns is approximately 60,000,000. The following table gives the areas and populations of each area, population statistics being in general for 1921.

	Area (sq. miles).	*Population.*
Europe.		
Gibraltar	2	18,061
Malta	122	212,258
Cyprus	3,584	310,469
The Americas.		
British West Indies	12,482	1,728,735
Bermuda	19	20,127
British Guiana	89,480	297,691
British Honduras	8,598	45,317
Falkland Islands	7,500	3,431
Africa.		
Swaziland	6,678	106,961
Basutoland	11,716	498,781
Bechuanaland	275,000	152,983
Southern Rhodesia	148,575	899,187
Northern Rhodesia	291,000	983,539
Nyasaland	39,467	1,201,983
Uganda	110,300	2,921,608
Kenya	211,060	2,529,133
Zanzibar	1,020	197,000
Somaliland	68,000	347,000
Sudan	1,014,600	4,853,000
St. Helena	47	3,666
Ascension	34	250

	Area (sq. miles).	*Population.*
Africa (continued).		
Nigeria	336,778	18,070,608
Gold Coast	78,650	2,110,474
Sierra Leone	30,000	1,541,311
Gambia	4,010	210,530
Mauritius	809	384,879
Seychelles	156	24,523
Asia.		
Ceylon	25,481	4,498,605
Aden and Perim	80	56,500
Socotra	1,382	12,000
Straits Settlements	1,600	883,769
Federated Malay States	27,648	1,324,890
Unfederated Malay States	23,355	1,123,944
Brunei	4,000	25,451
British North Borneo	31,106	257,804
Sarawak	42,000	600,000
Hong-Kong	391	625,166
Oceania.		
Papua	90,540	275,000
Fiji	7,435	157,266
Gilbert and Ellice Islands	180	20,897
Solomon Islands	14,800	150,516
Tonga Islands	390	24,935
Mandated Areas.		
British Cameroons	31,000	623,309
Iraq	116,511	2,849,282
Palestine	9,000	761,796
Tanganyika	373,494	4,123,493
British Togoland	13,040	187,939
South-West Africa	322,000	227,739
New Guinea	91,000	254,000
Western Samoa	1,260	37,157
Nauru	8	2,166

Production.—Manufacturing industries in the Colonial Empire are, as yet, comparatively unimportant, those that exist being almost entirely connected with the treatment of primary products. These areas consequently present a wonderful field for British manufactured goods. The markets are rapidly expanding in importance as the output of agricultural, pastoral, and mineral products increases.

These areas are also of immense value as sources of the raw materials essential to British industry. Minerals, cotton, wool, sisal, timber, cocoa, sugar, rubber, etc., are produced in abundance, and production will greatly extend as the areas are further developed.

Overseas Trade.—The outstanding feature of the Colonies and Protectorates since 1913 has been the growth in their overseas trade. Both exports and imports have steadily increased in quantity and value. The following table enables a comparison to be made between the import and export trade for 1913 and 1927: the trade of Egypt and the mandated territories are not included.

MERCHANDISE ONLY.

	1913.	1927.
Imports.	£	£
Total imports	100,000,000	252,000,000
Imports from the United Kingdom	31,000,000	66,000,000
Imports from other Empire areas	28,000,000	63,000,000
Imports from foreign countries	41,000,000	123,000,000
Domestic Exports.		
Total exports	76,000,000	208,000,000
Exports to the United Kingdom	45,000,000	62,000,000
Exports to other Empire areas	3,000,000	28,000,000
Exports to foreign countries	28,000,000	117,000,000

This table clearly shows that foreign countries are obtaining a much greater share of the increased trade of the Colonies and Protectorates than the United Kingdom. Since 1927 a

further expansion has been shown in the trade of these territories.

Tariffs. — Preferential tariff treatment for imports of United Kingdom origin is given in Southern Rhodesia and the British West Indies. No preference is granted in the remaining territories in the Colonial Empire.

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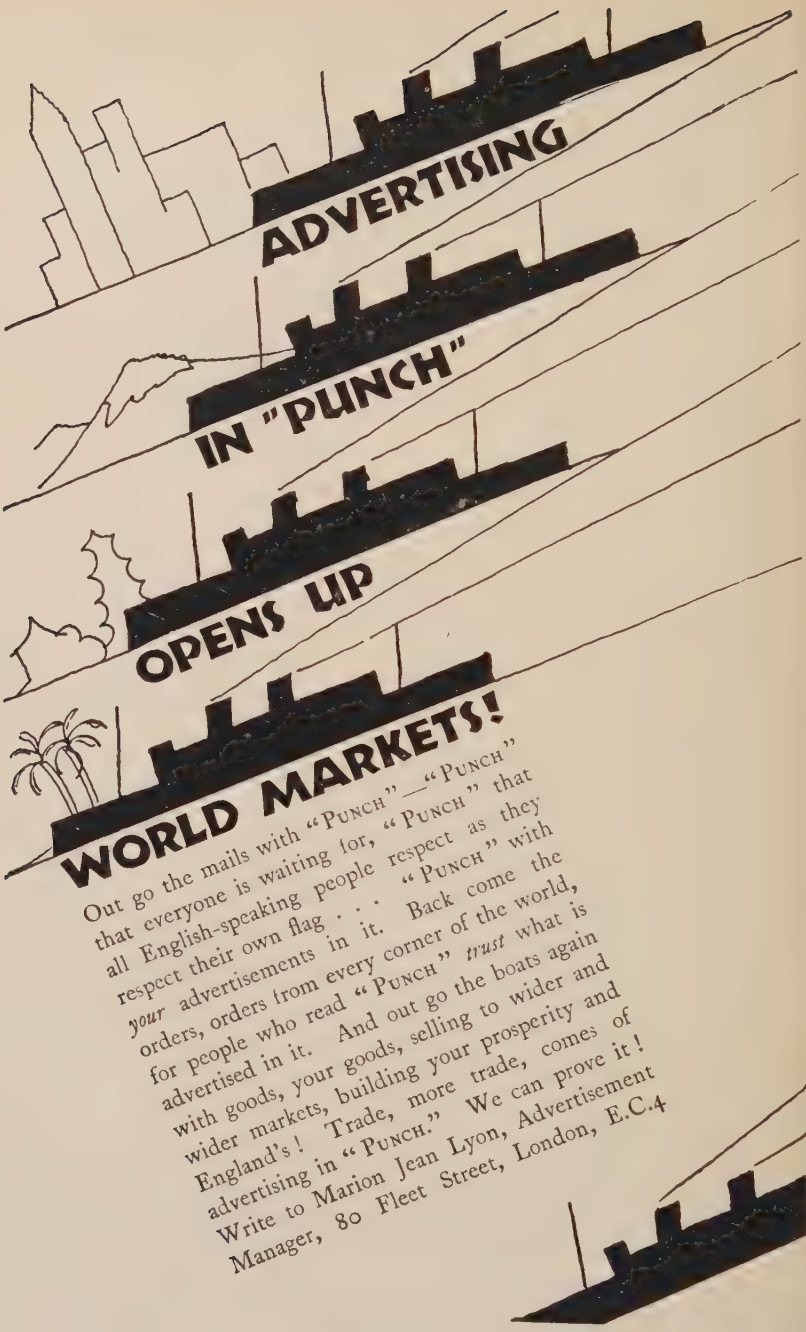

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